Postal Package Partner User's Guide

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Introduction & Support

Introduction

Postal Package Partner (PPP) is a software program that makes shipping by Priority Mail, Express Mail, Package Services and First Class Mail easier and more cost effective. It allows you to print shipping labels, calculate postage and special service fees, and print management reports for these classes of mail.

Depending on the product configuration, features include electronic delivery confirmation, E-Mail notification and mail manifesting. There are also many special features available, including the ability to use private insurance, import package information, and provide real-time access to your Order or Customer Database.

PPP sends and receives your shipping information electronically by transmitting a file containing information about your Delivery Confirmation packages daily to the USPS Host Computer. This automatically qualifies you for the special "USPS Electronic Rate", which provides you with FREE Delivery Confirmation for Priority Mail and only a discounted rate for First Class and Package Services (saving you money on each package you send with Delivery Confirmation).

Standard, GOLD & Advanced Product Comparison

Standard

- Free Priority Delivery Confirmation
- Discounted Signature Confirmation
- Supports Priority, First Class, Parcel Post, Bound Printed Matter, Library Mail & Media Mail
- Supports Predetermined Weights
- Supports Special Services
- Zip+4 Address Checking
- E-Mail Notification
- No Minimums Per Shipment (Postage is paid via Meter, Stamps, or DaZzle Internet Postage)

GOLD

- Free Priority Delivery Confirmation
- Discounted Signature Confirmation
- Supports Priority, First Class & Parcel Post
- Supports USPS Insurance
- Zip+4 Address Checking
- E-Mail Notification
- 50-lb./200 piece daily minimum requirement for manifesting*
- Must Use Pre-Certified Printer & Scale

Advanced

- Free Priority Delivery Confirmation
- Discounted Signature Confirmation
- Supports Priority, First Class, Parcel Post, Bound Printed Matter, Library Mail & Media Mail
- Supports Express Mail Manifesting with USPS Approval
- Supports Predetermined Weights
- Supports Special Services
- Zip+4 Address Checking
- E-Mail Notification
- 50-lb./200 piece daily minimum requirement for manifesting*

***** You can apply for an exception to the 50-lb./200 piece daily minimum requirement for manifesting under the Minimum Volume Reduction Provision Program (MVRP). Your USPS Sales Center Manager must grant permission. Under this program you can be granted a temporary waiver of the minimums if you meet one of the three criteria below:

1. **Ramp up.** You can mail less than the minimum for a certain period of time if you believe your volume will eventually exceed the minimums due to business growth or diversion of shipping business from other carriers.
2. **Average.** You occasionally mail less than the minimum but on the average, you are mailing over the required minimums.
3. **Aggregate.** You have multiple locations shipping in excess of the minimums when the volumes are combined.

SYSTEM REQUIREMENTS

As a Microsoft® Gold Certified Partner

Window Book follows Microsoft's published time line for phasing out support of retired MS products.

For more detailed information and the specific dates on Microsoft's Product Life cycles, please visit: Microsoft's web page on this subject:
http://support.microsoft.com/default.aspx?scid=fh;%5bln%5d;LifeWin

---

Single User System

Recommended: Pentium 4 processor or better
2.2 GHz or better
1 GB RAM or more
20 GB free on hard drive for Postal Package Partner™ data (7200 RPM hard drive or better)
display adapter resolution must be able to accommodate 800 x 600 or greater display mode
Desktop Operating System: Windows XP Pro, Vista

Network Workstation

Minimum Requirements: Pentium 4 processor or better
2.2 GHz or better
1 GB RAM or more
10 GB free on hard drive for Postal Package Partner™ data (7200 RPM hard drive or better)
display must be able to accommodate 800 x 600 or greater display mode.
Desktop Operating System: Windows XP Pro, Vista

Server and Network

Recommended:
Dedicated server for the product.
2 GB RAM
50 GB hard disk space
2.2 GHz Pentium 4 processor or better

100 mbps is minimum recommended network speed. Use switches instead of hubs for best results

Server Operating Systems: MS Server 2003 or higher

For information on Pervasive.SQL Server System Requirements, please visit their web site here.

Software Requirements

Before installing the Postal Package Partner™ program, there are a few prerequisites that need to be set up first.

1. **The installation of Pervasive SQL v10 is required.**
    - Pervasive.SQL is a well-known and highly regarded SQL database engine that provides reliable data access and overall performance .
    - If your Postal Package Partner™ registration is for 1 to 5 users on a Windows based server or a stand-alone configuration, you will need to install Pervasive SQL Workgroup Edition which can be downloaded from our Pervasive download webpage. Pervasive must be installed on the server and workstations that will be accessing Postal Package Partner™. Please contact your Sales Representative to get your license key.
    - If your Postal Package Partner™ registration is for a network installation with 6+ concurrent users, you will need to install Pervasive SQL Client/Server Edition. Please contact your Sales Representative for a link to download the software and to receive your license key.
2. **The installation of Microsoft .NET Framework version 3.5+ is required.**

Server and Network

Recommended:
Dedicated server for the product.
2 GB RAM
50 GB hard disk space
2.2 GHz Pentium 4 processor or better

100 mbps is minimum recommended network speed. Use switches instead of hubs for best results

Server Operating Systems: MS Server 2003 or higher

For information on Pervasive.SQL Server System Requirements, please visit their web site here.

Software Requirements

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1. **The installation of Pervasive SQL v10 is required.**
    - Pervasive.SQL is a well-known and highly regarded SQL database engine that provides reliable data access and overall performance .
    - If your Postal Package Partner™ registration is for 1 to 5 users on a Windows based server or a stand-alone configuration, you will need to install Pervasive SQL Workgroup Edition which can be downloaded from our Pervasive download webpage. Pervasive must be installed on the server and workstations that will be accessing Postal Package Partner™. Please contact your Sales Representative to get your license key.
    - If your Postal Package Partner™ registration is for a network installation with 6+ concurrent users, you will need to install Pervasive SQL Client/Server Edition. Please contact your Sales Representative for a link to download the software and to receive your license key.
2. **The installation of Microsoft .NET Framework version 3.5+ is required.**

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17. ***Tracking.*** Window Book will track the number of packages sent from each copy of the Software Application, and both Window Book and the USPS will receive information concerning packages shipped.

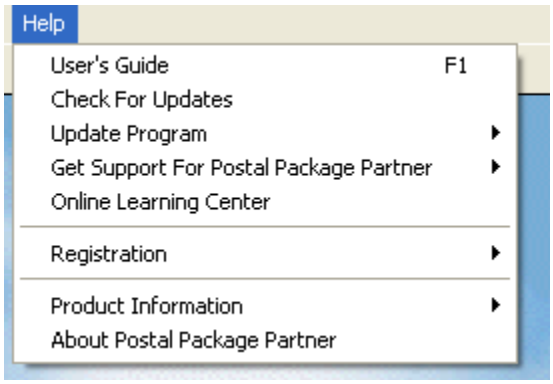
18. ***Notices.*** Window Book may contact you to notify you of updates to the Software Product.

19. ***Further Information, Questions.*** If you should have any questions concerning this End-User License, of if you wish to contact Window Book for any reason, please write us at: Window Book, Inc. 300 Franklin Street, Cambridge, Massachusetts, call 1.617.902.4520, or e-mail info@windowbook.com.

How To Get Support

A tremendous amount of resources, help, and support are accessible right from within your program!

Click on the Help listing for the following:

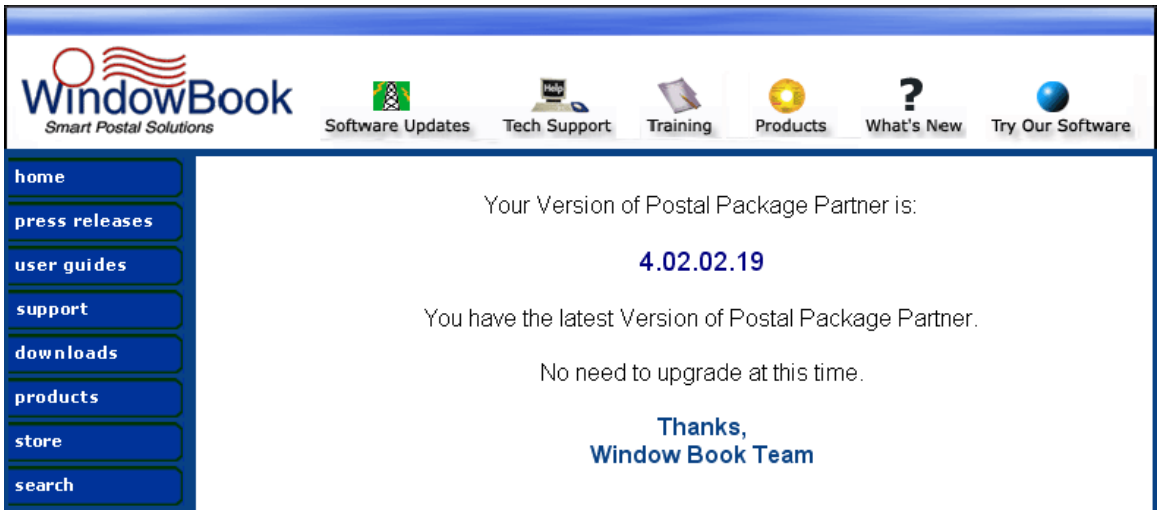


User Guide

Access the full User Guide for PPP from this menu listing, or by hitting your F1 key. The Full User Guide, plus the Postal Package Partner Quick Start Guide can be accessed from our website, www.windowbook.com/userguides

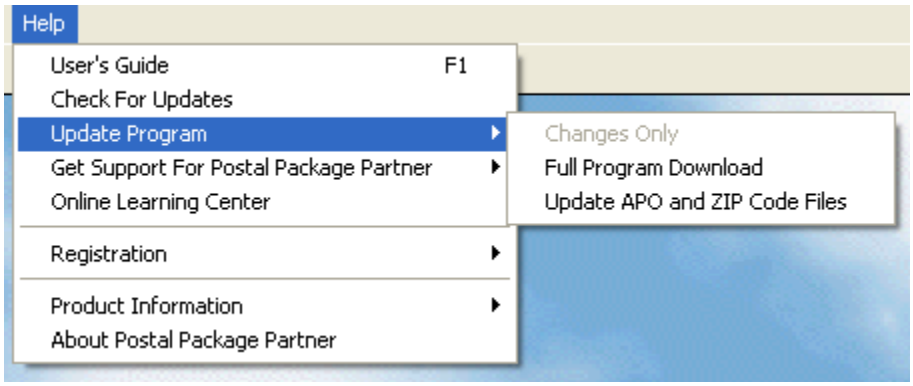
Check For Updates

With an open Internet connection, clicking on Check For Updates will check your program version and compare it to the latest public release. You will be taken to a web page that will give you the information on what step you need to take next. If you are fully updated, you will see a message like this:



If you need to update, you will be instructed as to what the latest version is, and how to get it.

Update Program



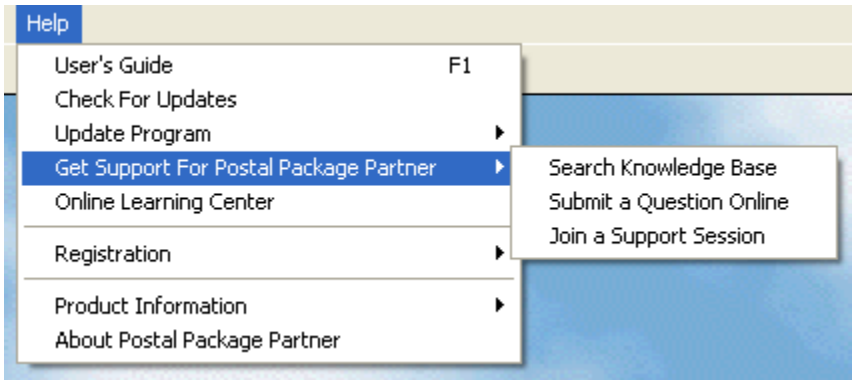
Update Program gives you access to three Software Update choices. You must have an open Internet connection, and ALL USERS must be out of the program before running any of these update maintenance functions.

Changes Only: Replaces Internet Update (note that the Communications Tower that formerly controlled this from your Toolbar is now gone). Click to update only the portions of the program that have been updated since the last time you updated your software.

Full Program Download: Clicking here will take you to the full update access page, complete with important release information, Update Notes access, and access to the download itself. You will need to download the full update file, and then run it to update your software. See detailed updating instructions at this page as well.

UPDATE APO and Zip Code files: Clicking here will update your APO and Zip Code Files. This will not update the full program, your program version will not change.

Get Support For PPP



This is the most important tool you have in order to get Technical Support in the FASTEST, most efficient manner possible. ALL Tech Support needs to go through this system in order to be handled.

The Knowledge Base support system was implemented in order to get you both fast and reliable support. Incoming questions/problems are routed directly to the first available support representative who is best qualified to handle your particular query. Incidents are handled more quickly and efficiently than ever before!

Follow these steps to getting your Incident resolved:

STEP # 1 Search the database
INSTANT ONLINE ANSWERS
Clicking here will bring you to Instant Answers Online. We store all resolved queries in our solution database. Search by product, category, keywords, or phrases. Available 24 hours a day! In most support cases, you will find the answer you are looking for here, and be able to resolve the situation quickly with the information provided. This may be the only step you need to take! If you cannot find the answer to your particular incident, go to STEP 2

STEP #2 Ask a Question
SUBMIT A QUESTION ONLINE
Submit a question to our technical support staff. Be sure to scroll to the bottom of the question form and click on the "Submit" button. You will receive both instant on-screen verification and an e-mail with your incident reference number, confirming that your query has been received and routed to achieve the fastest resolution possible. Use your incident number in future correspondence to help speed resolution. A support representative will help you resolve your incident.
The Knowledge Base support system also gives you access to the following:

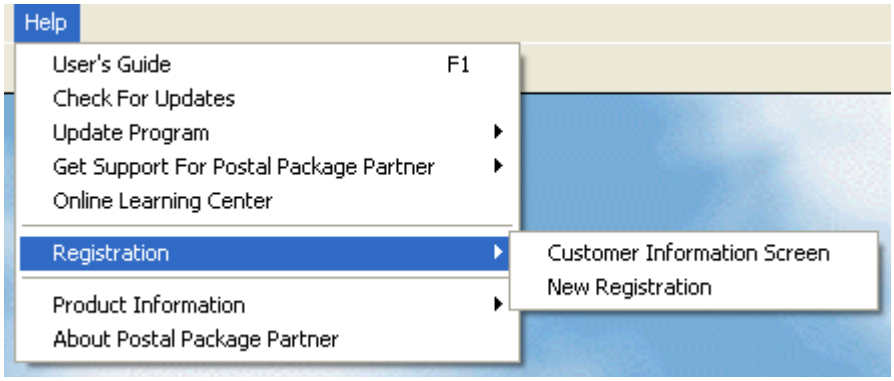
My Stuff
Login to check the status of your questions, modify your answer update notifications, update your personal profile, or access restricted information and features.

Provide Feedback
Submit a suggestion, complaint, or other feedback about this site or any of our products and
services here.

As more incidents are logged and resolved the database becomes more and more powerful and dynamic in serving your needs. Be sure to take full advantage of this support system!

Join A Support Session - When your Tech Support person directs you to enter into an Online Support Session, you can access it quickly and easily from here.

Registration -



Access your Customer Information Screen and the location to enter your New Registration Codes. For complete, detailed instructions on entering your Customer Information and Registration Code, refer to the section titled "Registration/Data Entry" in this Guide.

Online Learning Center

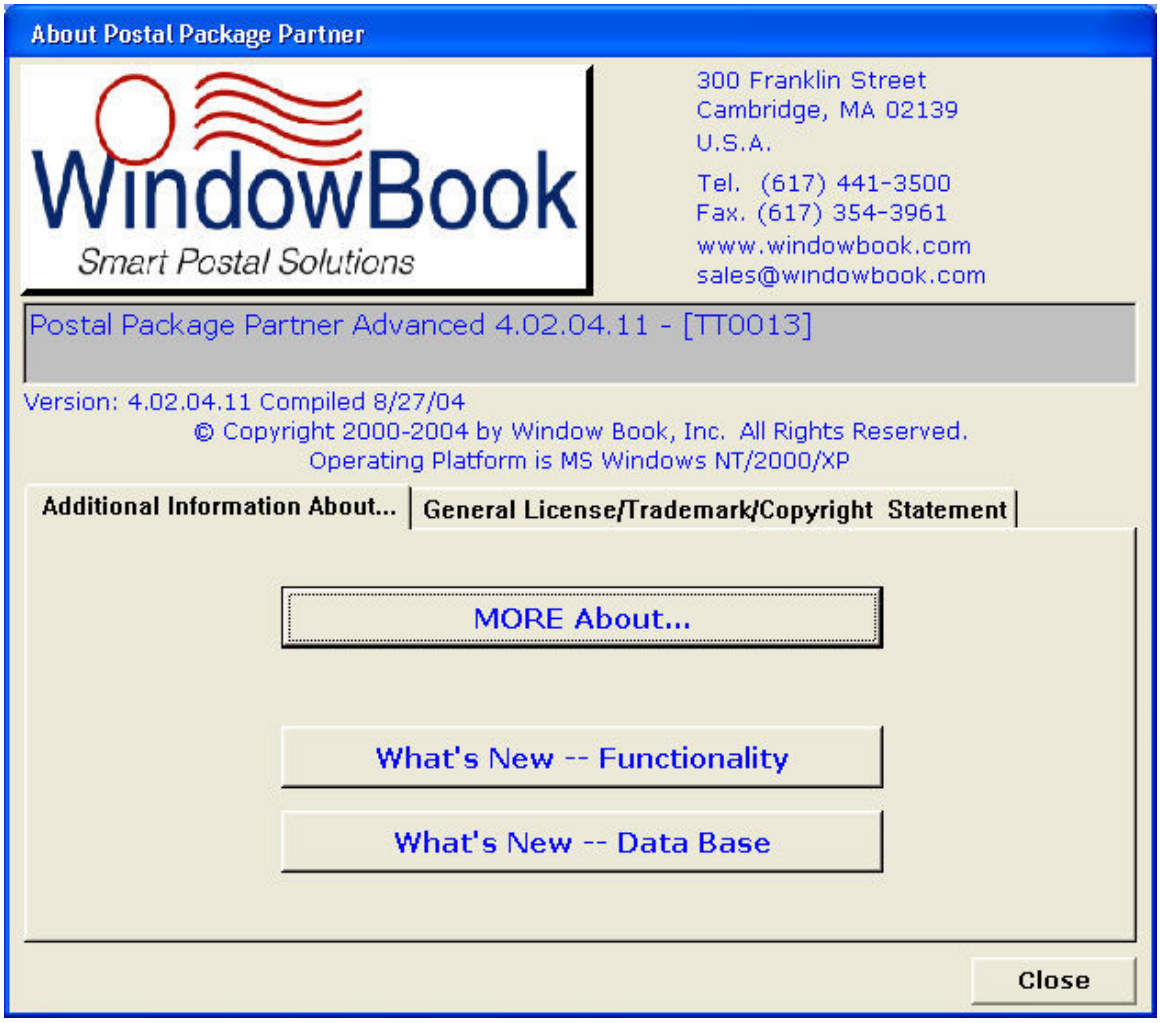
Clicking on Online Learning Center will take you to a web page where all of our online Training Tutorials are posted, for FREE access.

Product Information

Clicking on Product Information will give you access to choose from either the Window Book main website, or the PPP product page.

About PPP

Clicking on About PPP will bring up this troubleshooting information access panel:



MORE About: Gives you access to Database Version Info, PPP Registered Options, and Environment information.

What's New -- Functionality: Gives you access to release notes.

What's New -- Data Base: Gives you access to database read-me information.

Technical Support Via The Web:

You can access support from any of the www.windowbook.com webpages via the TECH SUPPORT icon:

Or access from the SUPPORT button link in the left hand column on all of the pages.

support

Optional Modules

Express Mail Manifesting

Add the ability to do Express Mail Manifesting to your Standard or GOLD Program. This feature is already included in the Advanced Version.

Global Express Mail Manifesting

Add the ability to do Global Express Mail Manifesting and enjoy the following benefits:

- Easy electronic postage payment of Global Express Mail
- Shipments qualify for Postal Service discount
- Saves labor by printing the necessary customs forms on plain paper
- Requires no minimum volume to qualify for Postal Manifesting

International Manifesting

This module allows you to process and ship your international shipments, in order to produce a combined Domestic and International Manifest. The following mail classes are supported:

- Global Priority Mail
- Global Airmail Parcel Post
- Global Airmail Letter-post
- Global Economy Parcel Post
- Global Economy Letter-post

ODBC Connect

A Postal Package Partner option which allows you to access databases from other programs in real-time via ODBC. It allows you to look up order, invoice or customer information so that batch export/import processes can be eliminated. It is designed to allow a shipping workstation to access individual orders or customer data as packages need to be shipped.

Advanced Connectivity

The Advanced Connectivity Module adds the following 3 Features to your Postal Package Partner Program:

> ***ODBC Connect.*** A Postal Package Partner option which allows you to access databases from other programs in real-time via ODBC. It allows you to look up order, invoice or customer information so that batch export/import processes can be eliminated. It is designed to allow a

shipping workstation to access individual orders or customer data as packages need to be shipped.

Import Agent. Allows Postal Package Partner to monitor a specific folder for incoming files and to import these files automatically. The Import Agent can be set up for a folder on a LAN or WAN. It may also be set up for a folder on a FTP site. The Import Agent is excellent for getting data from remote locations or mainframe computers or in the case of Internet Shopping Cart.

Advanced Multi-Class/Multi-Special Services Import. Postal Package Partner's standard import engine can only import one class of mail at a time. The Advanced Multi-Class Import option allows you to define different classes of mail, different processing categories and special services. It also allows you to create package records for multiple mailing classes in a single import pass.

PrntMax

This module speeds your package production by adding high-speed label printing to your PPP subscription. This optional module can print up to 35 labels per minute.

Multi-Permit/Multi-Manifest Option

Multi-Permit. Add the ability to setup different permits from the Return Address Maintenance screen and associate a permit to a return address. There will be a separate Manifest created for each permit mailed.

Multi-Manifest. Add the ability to create multiple manifests and multiple permits and then associate them with different client and/or job data. Postal Package Partner's postage statements will then print your client, job and mailing agent data on your statements for you.

Permit Balance Tracking

This is an add-on to the Multi-Manifest Module. It adds the ability for you to easily keep track of the balances in all of your Permit Accounts.

Smart Mail

Postal Package Partner's SmartMail Module creates Parcel Select shipping labels for parcels that weigh one pound and over. Shipping labels include the consolidator’s corporate indicia, a Delivery Confirmation barcode, delivery and return address information, and label endorsements. Parcel Select labels also include the concatenated Confirmation and Routing barcode required by USPS. Because Postal Package Partner generates the USPS Standardized

label with its final Confirmation Services tracking number, over labeling by SmartMail can be avoided.

UPS Mail Innovations

Postal Package Partner's UPS Mail Innovations Module prepares your Presorted STD and Media Mail parcels for pick-up by UPS Mail Innovations. Shipping labels include a confirmation services barcode along with the delivery and return address information. Because Postal Package Partner generates the USPS Standardized label with its final Confirmation Services tracking number, you avoid over-labeling charges. At the end of the day, UPS Mail Innovations scans each parcel upon arrival, applies their indicia and uploads the tracking numbers to USPS directly.

R.R. Donnelley

Postal Package Partner's RR Donnelley Logistics Module prepares your Parcel Select and Presorted STD parcels for pick-up by RR Donnelley Logistics. Because Postal Package Partner generates the RR Donnelley Logistics-approved bar-coded label, you avoid over-labeling charges. At the end of your shipping day, Postal Package Partner generates and uploads a package data file to RR Donnelley Logistics who uses the file to process your incoming parcels—as a result, RRDL has all information on each package before pickup, including weight and size flags.

Parcel Direct

Postal Package Partner's Parcel Direct Module creates Parcel Select shipping labels for parcels that weigh one pound and over and Presorted STD shipping labels for parcels that weigh less than one pound. Because Postal Package Partner generates the USPS Standardized label with its final Confirmation Services tracking number, over labeling by Parcel Direct can be avoided. At the end of the day, Postal Package Partner generates and uploads a package data file to Parcel Direct who uses the file to process the shipper's incoming parcels.

Getting Started

Introduction

Getting Started

Standard Version

Obtain DUNS Number

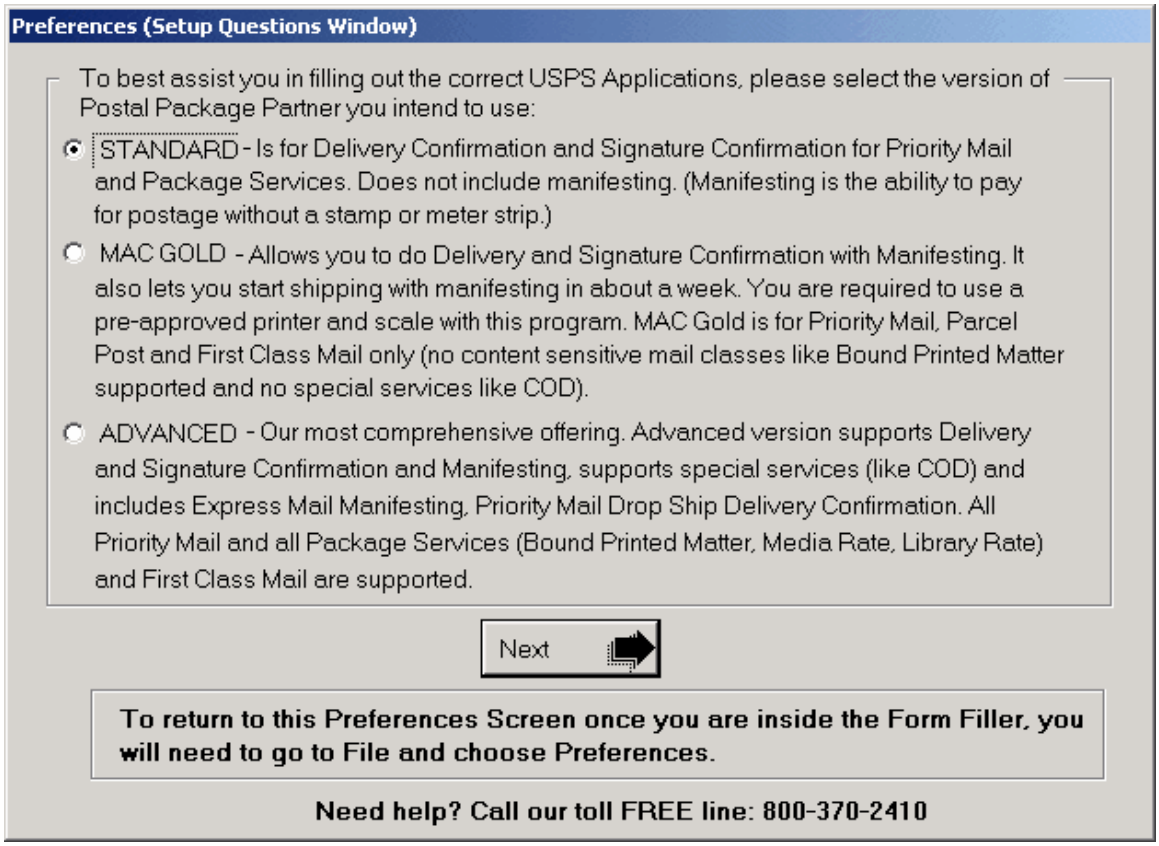
You need to obtain a DUNS Number if you don't already have one. This stands for Data Universal Numbering System and has become the standard for the company identifier in EDI and Global Electronic Commerce Transactions. Your DUNS Number is a nine-digit number issued by Dun and Bradstreet & is used by the Postal Service to uniquely identify your organization when you transmit your data to their Server daily. If you are planning to ship from more than 1 location, you will need to apply for a separate DUNS Number for each location.

You can apply for a DUNS Number if you don’t have one by going to D&B's website at www.dnb.com or by calling D&B at 1-800-333-0505. Online applications will be mailed to you within 5 business days. If you call for your DUNS# you can receive it within minutes.

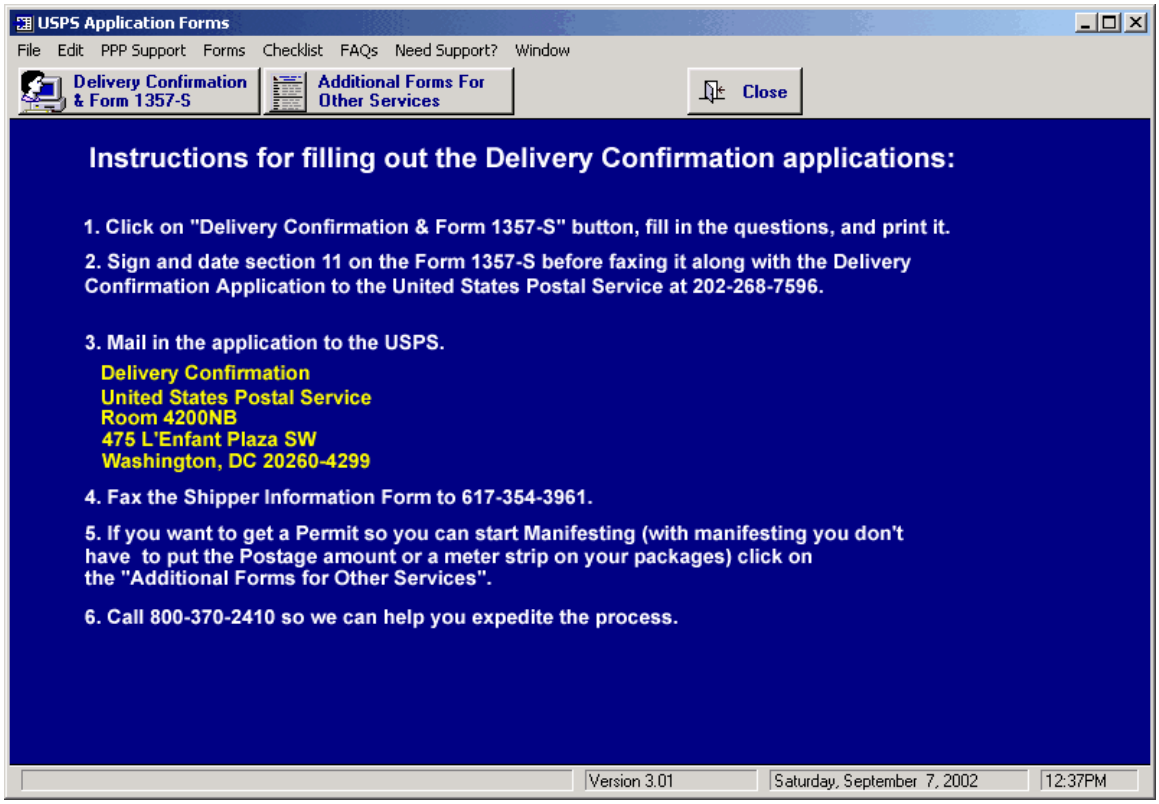
Apply For Mainframe User ID & Password

You can easily fill-out the paperwork required to obtain your USPS Mainframe User ID & Password by using the USPS Applications Form Filler Software.

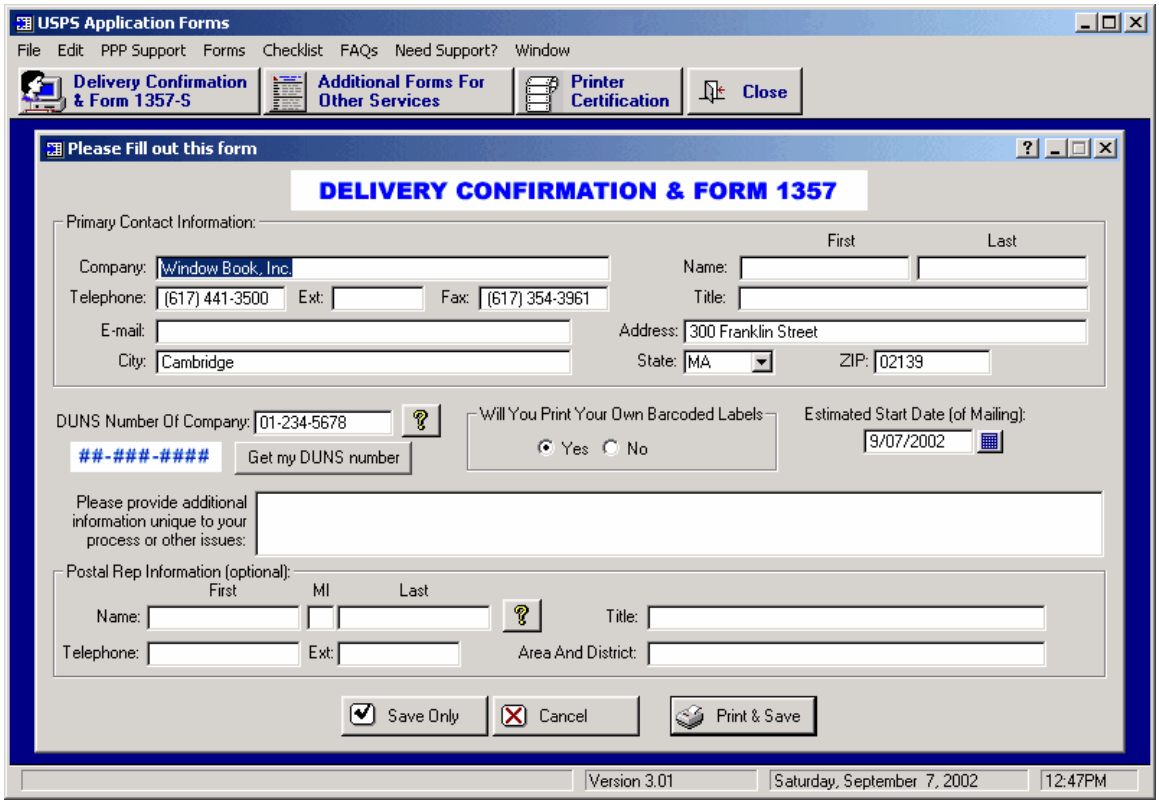
The first screen that you will see once you have opened the USPS Applications Form Filler Software is a grey box, titled Preferences. Select "Standard Version" and click "Next".


Preferences (Setup Questions Window)
To best assist you in filling out the correct USPS Applications, please select the version of Postal Package Partner you intend to use:
STANDARD - Is for Delivery Confirmation and Signature Confirmation for Priority Mail and Package Services. Does not include manifesting. (Manifesting is the ability to pay for postage without a stamp or meter strip.)
MAC GOLD - Allows you to do Delivery and Signature Confirmation with Manifesting. It also lets you start shipping with manifesting in about a week. You are required to use a pre-approved printer and scale with this program. MAC Gold is for Priority Mail, Parcel Post and First Class Mail only (no content sensitive mail classes like Bound Printed Matter supported and no special services like COD).
ADVANCED - Our most comprehensive offering. Advanced version supports Delivery and Signature Confirmation and Manifesting, supports special services (like COD) and includes Express Mail Manifesting, Priority Mail Drop Ship Delivery Confirmation. All Priority Mail and all Package Services (Bound Printed Matter, Media Rate, Library Rate) and First Class Mail are supported.
Next
To return to this Preferences Screen once you are inside the Form Filler, you will need to go to File and choose Preferences.
Need help? Call our toll FREE line: 800-370-2410

Next, you will see instructions for filling out Forms 5051 and 1357-S. These instructions will print out later, when you print your completed forms.


USPS Application Forms
File Edit PPP Support Forms Checklist FAQs Need Support? Window
Delivery Confirmation & Form 1357-S
Additional Forms For Other Services
Close
Instructions for filling out the Delivery Confirmation applications:
1. Click on "Delivery Confirmation & Form 1357-S" button, fill in the questions, and print it.
2. Sign and date section 11 on the Form 1357-S before faxing it along with the Delivery Confirmation Application to the United States Postal Service at 202-268-7596.
3. Mail in the application to the USPS.
Delivery Confirmation
United States Postal Service
Room 4200NB
475 L'Enfant Plaza SW
Washington, DC 20260-4299
4. Fax the Shipper Information Form to 617-354-3961.
5. If you want to get a Permit so you can start Manifesting (with manifesting you don't have to put the Postage amount or a meter strip on your packages) click on the "Additional Forms for Other Services".
6. Call 800-370-2410 so we can help you expedite the process.
Version 3.01
Saturday, September 7, 2002
12:37PM

Click on the Delivery Confirmation and Form 1357-S tab in the upper left-hand corner, under File.



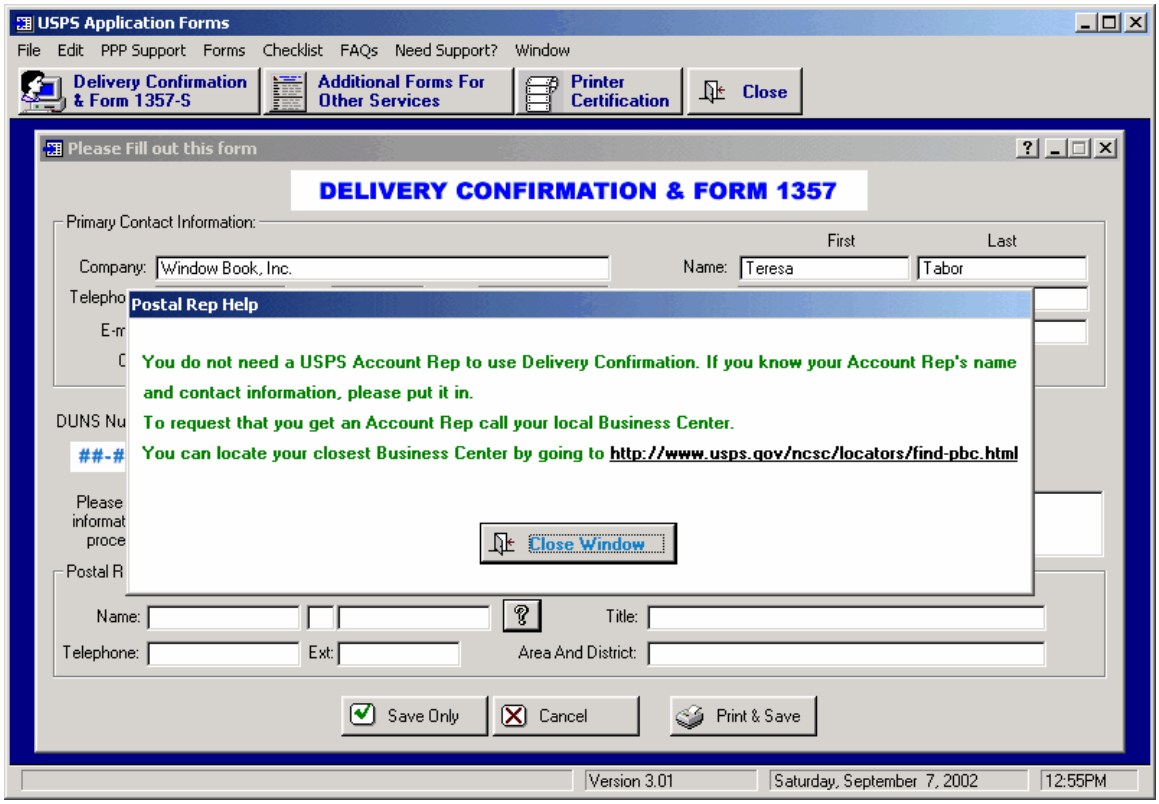
First, complete the information in the Primary Contact Information Section. To enter the data, simply click in the Company Field and enter your information. To move to the next field, select Tab on your keyboard. Continue to fill out all of the fields in this manner.

You will need to type-in your DUNS number. If you don't have a DUNS number, you can easily obtain one for free by calling DUN and Bradstreet at (888) 814-1435 Mon-Fri. 8:00 A.M.-6:00 P.M. EST or by logging onto their web site at www.dnb.com

Will you print your own delivery confirmation labels? Select the appropriate answer. The most common answer is "Yes" as PPP Standard prints your delivery confirmation labels for you. However, if you are going to use pre-printed USPS labels, select "No".

Fill in the Estimated Start Date of Your Mailing by clicking on the Calendar. Use the arrows at the top of the Calendar to choose the month, then click the date on which you want to begin shipping.

Finally, fill in your USPS Postal Rep. Information, if you know it. You do not need a USPS Account Rep. To use Delivery Confirmation, but if you would like to get one, please click on the yellow question mark beside the field - This button appears throughout the form filler to aid you in answering questions that you may have.

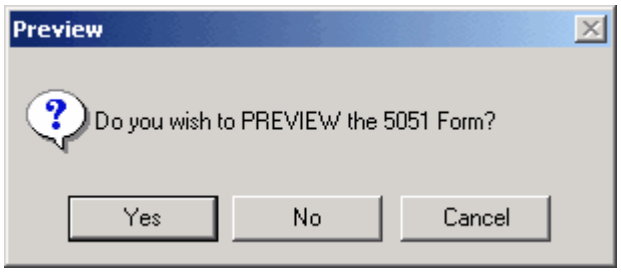

USPS Application Forms
File Edit PPP Support Forms Checklist FAQs Need Support? Window
Delivery Confirmation & Form 1357-S
Additional Forms For Other Services
Printer Certification
Close
Please Fill out this form
DELIVERY CONFIRMATION & FORM 1357
Primary Contact Information:
First
Last
Company: Window Book, Inc.
Name: Teresa Tabor
Postal Rep Help
You do not need a USPS Account Rep to use Delivery Confirmation. If you know your Account Rep's name and contact information, please put it in.
To request that you get an Account Rep call your local Business Center.
You can locate your closest Business Center by going to http://www.usps.gov/ncsc/locators/find-pbc.html
Close Window
Name:
Title:
Telephone:
Ext:
Area And District:
Save Only
Cancel
Print & Save
Version 3.01
Saturday, September 7, 2002
12:55PM

Here, you learn that you can request an Account Rep. By calling your Local Business Center. If you would like to obtain the number for your Local Business Center, please click on this link.

Your Internet Browser will open to a page which will help you find your local USPS Business Center. Simply type-in your city and state or zip and click on "Locate". This will bring up the location of the Business Center closest to you. Print this page and then close your Internet Browser to be brought back to the USPS Applications Form Filler Software.

After all of the fields on this screen are completed, you are ready to print your Forms 5051 and 1357-S. At the bottom of the screen, you should click the Print and Save button.

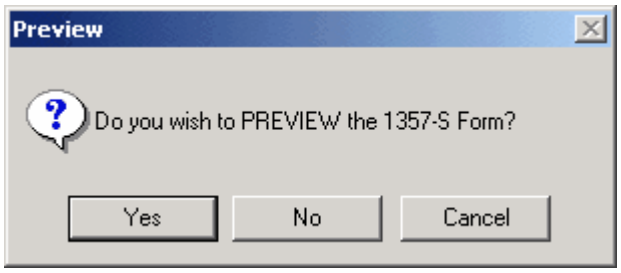
You will be asked if you want to preview the 5051 Form. Click yes.



The first page you will see contains the instructions for submitting the 5051 and 1357-S forms.

Next, you will see the completed Form 5051, which, you will notice, has been filled out by the form filler software. Last, is the Shipper Information form, which you should fax to Window Book at (617) 354-3961.

At the top of the preview screen, please click on the printer icon to print all of these pages.
You will be asked if you want to preview the 1357-S Form. Click yes to preview it.



Click on the printer icon at the top of the preview page to print. Please follow the instructions for signing and submitting the 5051 and 1357-S forms to the United States Postal Service.

Configure Hardware & Software

While you are waiting to receive your User ID & Password from USPS, you can configure your hardware and software by following the steps below:

1. Install and Register Postal Package Partner

Details on how to install Postal Package Partner can be found in the Installing PPP Section of this User's Guide.

2. Install Hardware

Details on how to install your scale and printer can be found in the Printer and Scale Section of this User's Guide

3. Configure Program

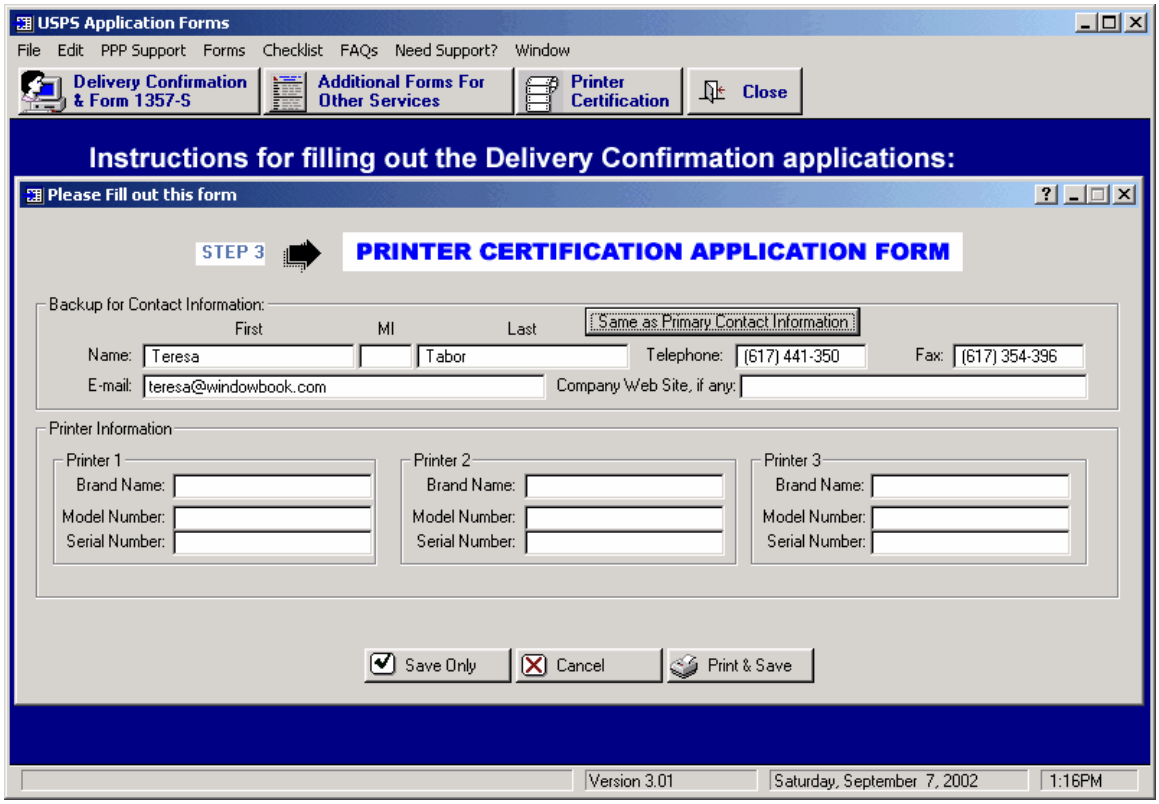
Before you can begin using Postal Package Partner, you will need to define your Program Settings by going to the Mailer Configuration Screen by going to File => System Setup => Mailer Configuration. Detailed instructions on how to do this can be found in the Mailer Configuration Section.

Get Label & File Certification From USPS

Within seven days of receipt of your completed Forms 1357-S and 5051, the USPS will fax you your User ID and Password and mail you a test kit. You will need to complete the Test and Certification process by printing test labels and communicating a test file to the USPS Server.

When you do this, you will also need to fill out the "Printer Certification Form" to include with your Sample Labels that you will be required to submit to USPS.

You can easily complete this form using the USPS Applications Form Filler Software. Click on the "Printer Certification" Icon. Then, click on the "Same as Primary Contact Information" button and the form filler will automatically populate some of the fields with the relevant information that you have already entered.



Next, enter the Name, Model and Serial Number of the printers you will use to print your labels.

Click the Print and Save button to preview and print your Printer Certification Form. You must submit this form, along with 20 test labels from each label printer you will be using, to the address at the bottom of the form.

When You Can Begin Shipping

Upon receipt of your labels and electronic test file, USPS will test both the quality of your labels and the content of your test file. Upon Approval, USPS will send you a copy of your Postal Form 3152 and you are ready to begin shipping with PPP.

GOLD Version

Obtain DUNS Number

You need to obtain a DUNS Number if you don't already have one. This stands for Data Universal Numbering System and has become the standard for the company identifier in EDI and Global Electronic Commerce Transactions. Your DUNS Number is a nine-digit number issued by Dun and Bradstreet & is used by the Postal Service to uniquely identify your organization when you transmit your data to their Server daily. If you are planning to ship from more than 1 location, you will need to apply for a separate DUNS Number for each location.
You can apply for a DUNS Number if you don’t have one by going to D&B's website at www.dnb.com or by calling D&B at 1-800-333-0505. Online applications will be mailed to you within 5 business days. If you call for your DUNS# you can receive it within minutes.

Setup Permit Account

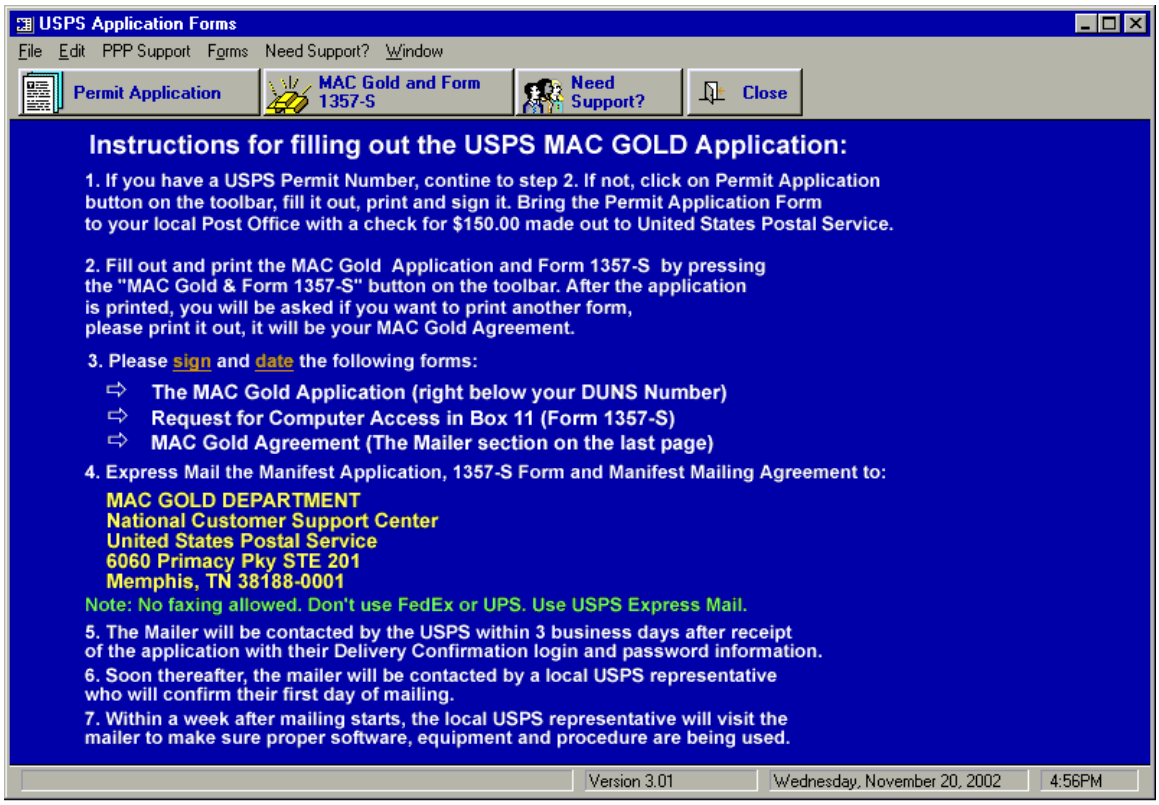
You will be required to pay a one-time fee of $125 to USPS to establish an account, and to keep sufficient funds on deposit in this account to cover your mailing costs. If you plan to do Express Mail Manifesting you must also set up a Corporate Account.

You can easily use the USPS Applications Form Filler software to quickly and easily fill-out the Permit Application.

Directions For Filling Out Permit Application Using USPS Applications Form Filler

The first screen that you will see once you have opened the USPS Applications Form Filler Software is a grey box, titled Preferences. Select MAC GOLD and click "Next".

Next, you will see instructions for filling out the USPS MAC GOLD Application. These instructions will print out later, when you print your completed forms:


USPS Application Forms
File Edit PPP Support Forms Need Support? Window
Permit Application
MAC Gold and Form 1357-S
Need Support?
Close
Instructions for filling out the USPS MAC GOLD Application:
1. If you have a USPS Permit Number, contine to step 2. If not, click on Permit Application button on the toolbar, fill it out, print and sign it. Bring the Permit Application Form to your local Post Office with a check for $150.00 made out to United States Postal Service.
2. Fill out and print the MAC Gold Application and Form 1357-S by pressing the "MAC Gold & Form 1357-S" button on the toolbar. After the application is printed, you will be asked if you want to print another form, please print it out, it will be your MAC Gold Agreement.
3. Please sign and date the following forms:
The MAC Gold Application (right below your DUNS Number)
Request for Computer Access in Box 11 (Form 1357-S)
MAC Gold Agreement (The Mailer section on the last page)
4. Express Mail the Manifest Application, 1357-S Form and Manifest Mailing Agreement to:
MAC GOLD DEPARTMENT
National Customer Support Center
United States Postal Service
6060 Primacy Pky STE 201
Memphis, TN 38188-0001
Note: No faxing allowed. Don't use FedEx or UPS. Use USPS Express Mail.
5. The Mailer will be contacted by the USPS within 3 business days after receipt of the application with their Delivery Confirmation login and password information.
6. Soon thereafter, the mailer will be contacted by a local USPS representative who will confirm their first day of mailing.
7. Within a week after mailing starts, the local USPS representative will visit the mailer to make sure proper software, equipment and procedure are being used.
Version 3.01
Wednesday, November 20, 2002
4:56PM

Click on the Permit Application button in the upper left-hand corner.

NOTE: If you already have a permit with your local post office, there is no need to complete this application. Simply use your existing permit number.

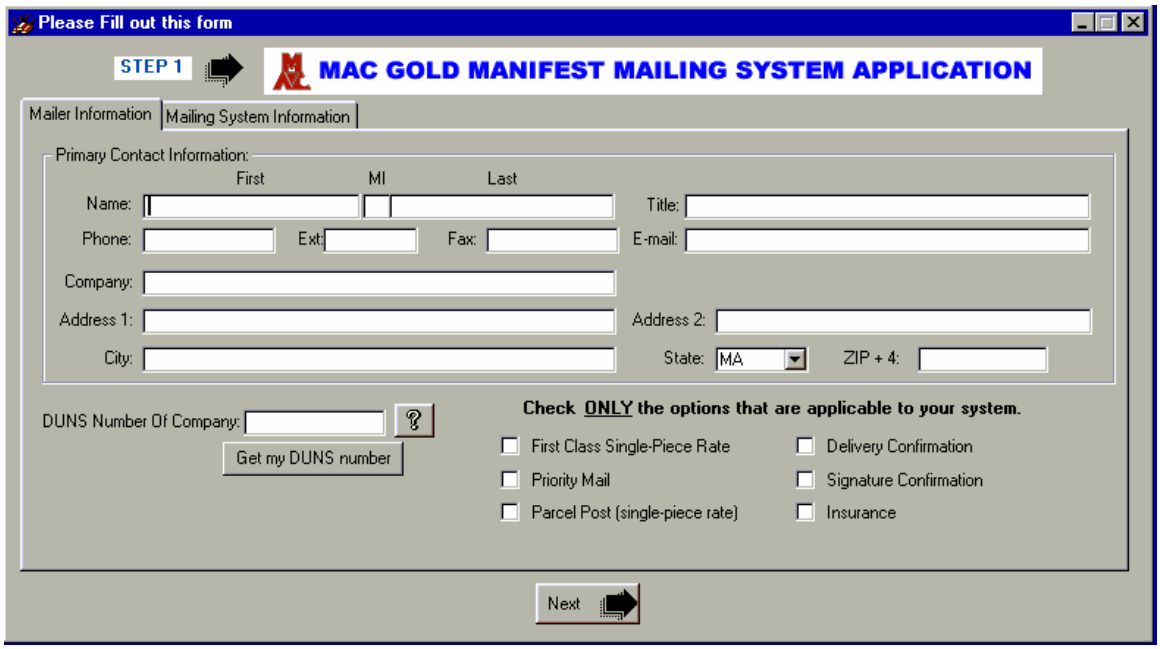
Complete the information on the Permit Application screen. To enter the data, simply click in the appropriate field and enter your information. Press Tab on your keyboard to move to the next field. Continue to fill out all of the fields in this manner.

When finished on this screen click Print and Save and three pages will print out including Instructions for Submitting Your Permit Application.

Complete MAC GOLD Application

You can easily fill-out the MAC GOLD Application using the USPS Applications Form Filler Software.

Click on the MAC Gold and Form 1357-S button.



Complete the information on the Mailer Information tab, then click "Next" to get to the Mailing System Information tab.

Complete the information on the Mailing System Information tab, then click the "Print and Save and Post Info Online" button. This action will open up your Web browser and load a page that you will need to fill out and submit. **NOTE:** You **MUST** have a permit to mail Priority Mail and/or Parcel Post to submit this application.

Fill it out, confirm that the information is correct and click the "Submit" button. You will then be asked to print out the MAC Gold Application and 1357-S Forms (4 pages). Next, you will be asked to print the MAC GOLD AGREEMENT (4 pages).

Follow the printed instructions to sign, date, and mail the paperwork.

Configure Hardware & Software

While you are waiting to receive your User ID & Password from USPS, you can configure your hardware and software by following the steps below:

1. Install and Register Postal Package Partner

Details on how to install Postal Package Partner can be found in the Installing PPP Section of this User's Guide.

2. Install Hardware

Details on how to install your scale and printer can be found in the Printer and Scale Section of this User's Guide

3. Configure Program

Before you can begin using Postal Package Partner, you will need to define your Program Settings by going to the Mailer Configuration Screen by going to File => System Setup => Mailer Configuration. Detailed instructions on how to do this can be found in the Mailer Configuration Section.

When You Can Begin Shipping

You can begin shipping with Postal Package Partner as soon as your receive your User ID and Password from USPS and enter it in your Mailer Configuration Screens. You can do this by going to File/System Setup/Mailer Configuration and clicking on the Communications/E-Mail Tab.

Advanced Version

Obtain DUNS Number

You need to obtain a DUNS Number if you don't already have one. This stands for Data Universal Numbering System and has become the standard for the company identifier in EDI and Global Electronic Commerce Transactions. Your DUNS Number is a nine-digit number issued by Dun and Bradstreet & is used by the Postal Service to uniquely identify your organization when you transmit your data to their Server daily. If you are planning to ship from more than 1 location, you will need to apply for a separate DUNS Number for each location.

You can apply for a DUNS Number if you don’t have one by going to D&B's website at www.dnb.com or by calling D&B at 1-800-333-0505. Online applications will be mailed to you within 5 business days. If you call for your DUNS# you can receive it within minutes.

Setup Permit Account

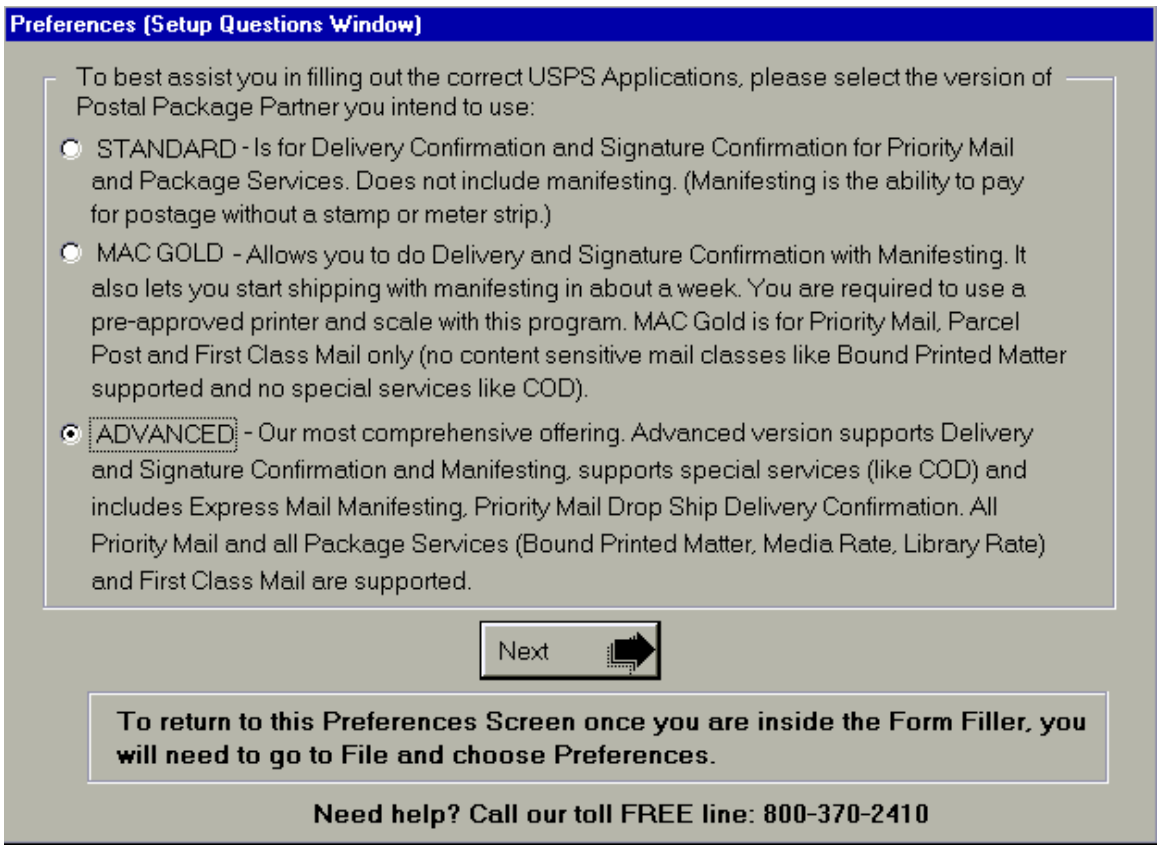
You will be required to pay a one-time fee of $125 to USPS to establish an account, and to keep sufficient funds on deposit in this account to cover your mailing costs. If you plan to do Express Mail Manifesting you must also set up a Corporate Account.

You can easily use the USPS Applications Form Filler software to quickly and easily fill-out the Permit Application.

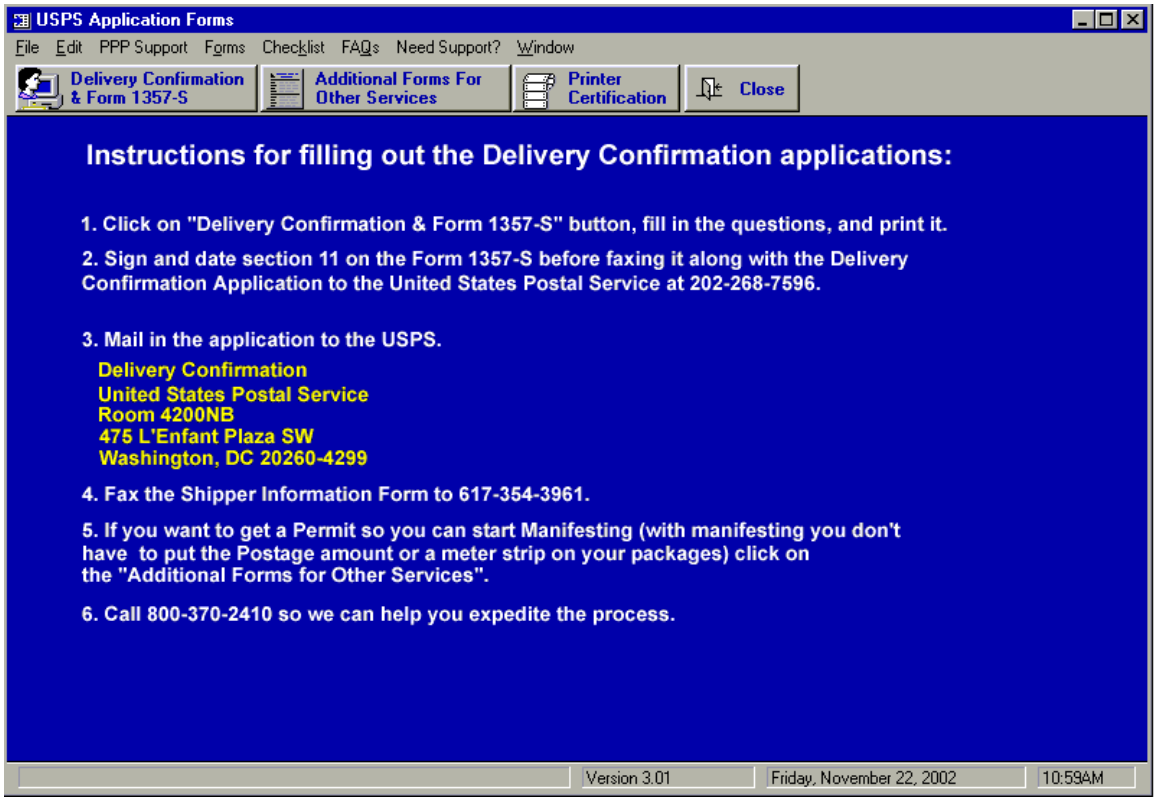
Apply For User ID & Password From USPS

You can easily fill-out the paperwork required to obtain your USPS Mainframe User ID & Password by using the USPS Applications Form Filler Software.

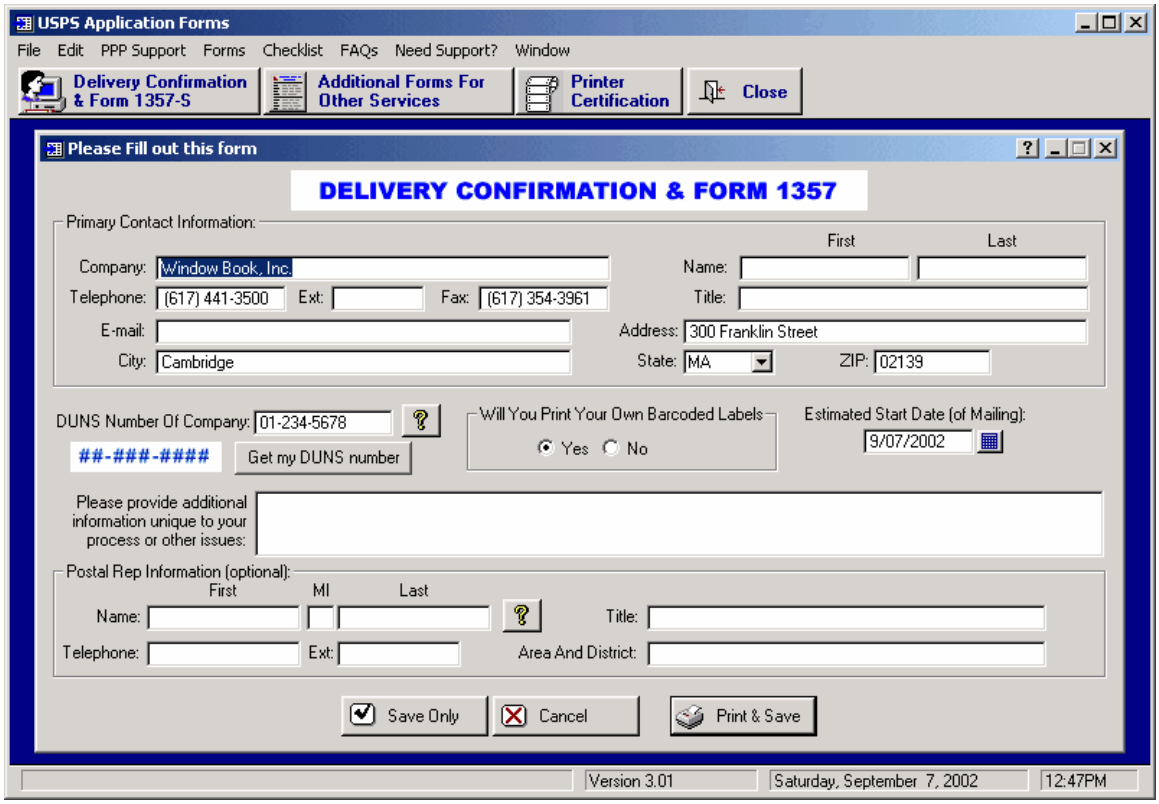
The first screen that you will see once you have opened the USPS Applications Form Filler Software is a grey box, titled Preferences. Select Advanced Version and click "Next".


Preferences (Setup Questions Window)
To best assist you in filling out the correct USPS Applications, please select the version of Postal Package Partner you intend to use:
STANDARD - Is for Delivery Confirmation and Signature Confirmation for Priority Mail and Package Services. Does not include manifesting. (Manifesting is the ability to pay for postage without a stamp or meter strip.)
MAC GOLD - Allows you to do Delivery and Signature Confirmation with Manifesting. It also lets you start shipping with manifesting in about a week. You are required to use a pre-approved printer and scale with this program. MAC Gold is for Priority Mail, Parcel Post and First Class Mail only (no content sensitive mail classes like Bound Printed Matter supported and no special services like COD).
ADVANCED - Our most comprehensive offering. Advanced version supports Delivery and Signature Confirmation and Manifesting, supports special services (like COD) and includes Express Mail Manifesting, Priority Mail Drop Ship Delivery Confirmation. All Priority Mail and all Package Services (Bound Printed Matter, Media Rate, Library Rate) and First Class Mail are supported.
Next
To return to this Preferences Screen once you are inside the Form Filler, you will need to go to File and choose Preferences.
Need help? Call our toll FREE line: 800-370-2410

Next, you will see instructions for filling out Forms 5051 and 1357-S. These instructions will print out later, when you print your completed forms.


USPS Application Forms
File Edit PPP Support Forms Checklist FAQs Need Support? Window
Delivery Confirmation & Form 1357-S
Additional Forms For Other Services
Printer Certification
Close
Instructions for filling out the Delivery Confirmation applications:
1. Click on "Delivery Confirmation & Form 1357-S" button, fill in the questions, and print it.
2. Sign and date section 11 on the Form 1357-S before faxing it along with the Delivery Confirmation Application to the United States Postal Service at 202-268-7596.
3. Mail in the application to the USPS.
Delivery Confirmation
United States Postal Service
Room 4200NB
475 L'Enfant Plaza SW
Washington, DC 20260-4299
4. Fax the Shipper Information Form to 617-354-3961.
5. If you want to get a Permit so you can start Manifesting (with manifesting you don't have to put the Postage amount or a meter strip on your packages) click on the "Additional Forms for Other Services".
6. Call 800-370-2410 so we can help you expedite the process.
Version 3.01
Friday, November 22, 2002
10:59AM

Click on the Delivery Confirmation and Form 1357-S tab in the upper left-hand corner, under File.



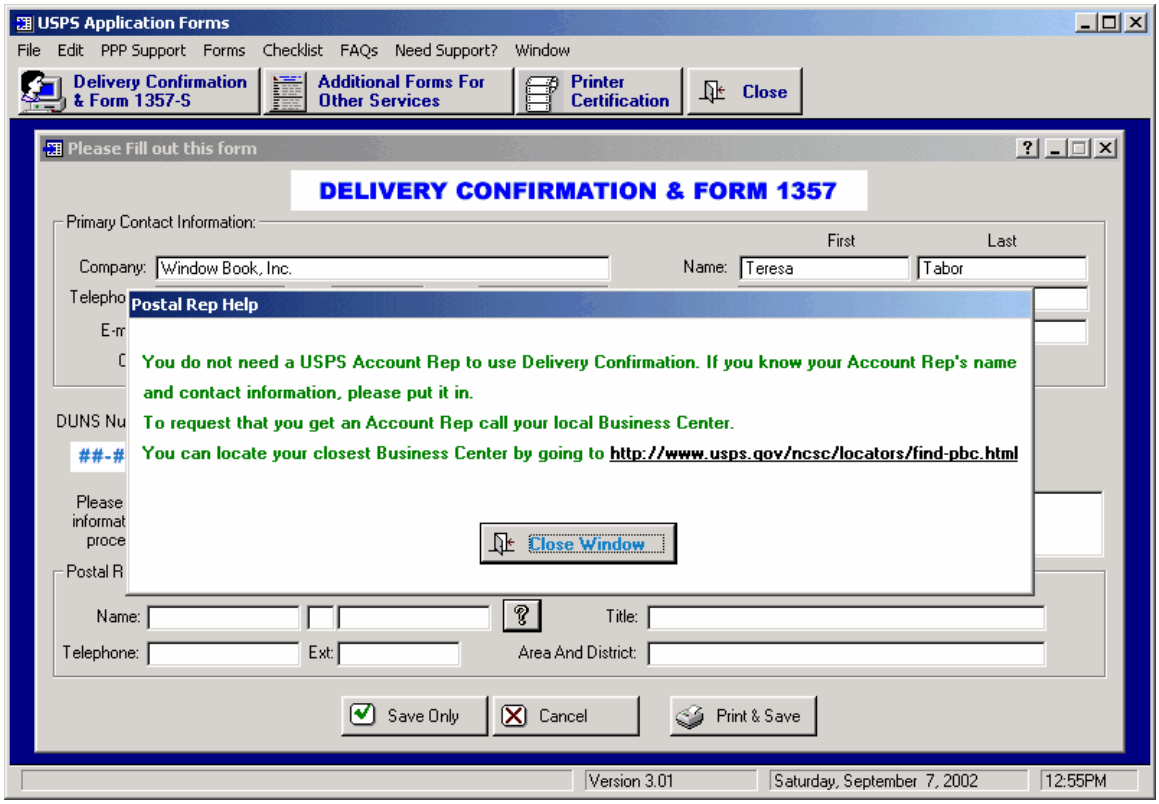
First, complete the information in the Primary Contact Information Section. To enter the data, simply click in the Company Field and enter your information. To move to the next field, select Tab on your keyboard. Continue to fill out all of the fields in this manner.

You will need to type-in your DUNS number. If you don't have a DUNS number, you can easily obtain one for free by calling DUN and Bradstreet at (888) 814-1435 Mon-Fri. 8:00 A.M.-6:00 P.M. EST or by logging onto their web site at www.dnb.com

Will you print your own delivery confirmation labels? Select the appropriate answer. The most common answer is "Yes" as PPP Standard prints your delivery confirmation labels for you. However, if you are going to use pre-printed USPS labels, select "No".

Fill in the Estimated Start Date of Your Mailing by clicking on the Calendar. Use the arrows at the top of the Calendar to choose the month, then click the date on which you want to begin shipping.

Finally, fill in your USPS Postal Rep. Information, if you know it. You do not need a USPS Account Rep. To use Delivery Confirmation, but if you would like to get one, please click on the yellow question mark beside the field - This button appears throughout the form filler to aid you in answering questions that you may have.

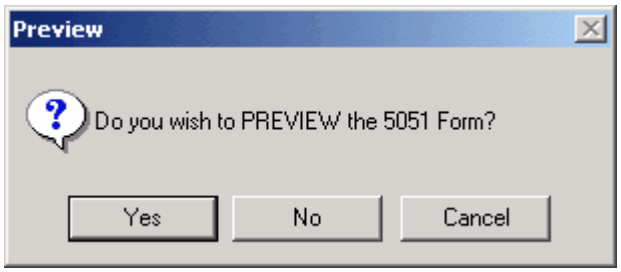

USPS Application Forms
File Edit PPP Support Forms Checklist FAQs Need Support? Window
Delivery Confirmation & Form 1357-S
Additional Forms For Other Services
Printer Certification
Close
Please Fill out this form
DELIVERY CONFIRMATION & FORM 1357
Primary Contact Information:
First
Last
Company: Window Book, Inc.
Name: Teresa Tabor
Postal Rep Help
You do not need a USPS Account Rep to use Delivery Confirmation. If you know your Account Rep's name and contact information, please put it in.
To request that you get an Account Rep call your local Business Center.
You can locate your closest Business Center by going to http://www.usps.gov/ncsc/locators/find-pbc.html
Close Window
Name:
Title:
Telephone:
Ext:
Area And District:
Save Only
Cancel
Print & Save
Version 3.01
Saturday, September 7, 2002
12:55PM

Here, you learn that you can request an Account Rep. By calling your Local Business Center. If you would like to obtain the number for your Local Business Center, please click on this link.

Your Internet Browser will open to a page which will help you find your local USPS Business Center. Simply type-in your city and state or zip and click on "Locate". This will bring up the location of the Business Center closest to you. Print this page and then close your Internet Browser to be brought back to the USPS Applications Form Filler Software.

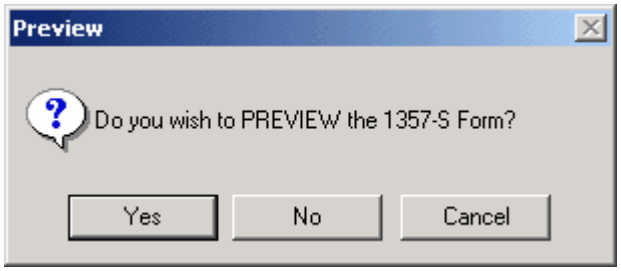
After all of the fields on this screen are completed, you are ready to print your Forms 5051 and 1357-S. At the bottom of the screen, you should click the Print and Save button.

You will be asked if you want to preview the 5051 Form. Click yes.



The first page you will see contains the instructions for submitting the 5051 and 1357-S forms. Next, you will see the completed Form 5051, which, you will notice, has been filled out by the form filler software. Last, is the Shipper Information form, which you should fax to Window Book at (617) 354-3961.

At the top of the preview screen, please click on the printer icon to print all of these pages.
You will be asked if you want to preview the 1357-S Form. Click yes to preview it.



Click on the printer icon at the top of the preview page to print. Please follow the instructions for signing and submitting the 5051 and 1357-S forms to the United States Postal Service.

Configure Hardware & Software

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2. Install Hardware

Details on how to install your scale and printer can be found in the Printer and Scale Section of this User's Guide

3. Configure Program

Before you can begin using Postal Package Partner, you will need to define your Program Settings by going to the Mailer Configuration Screen by going to File => System Setup => Mailer Configuration. Detailed instructions on how to do this can be found in the Mailer Configuration Section.
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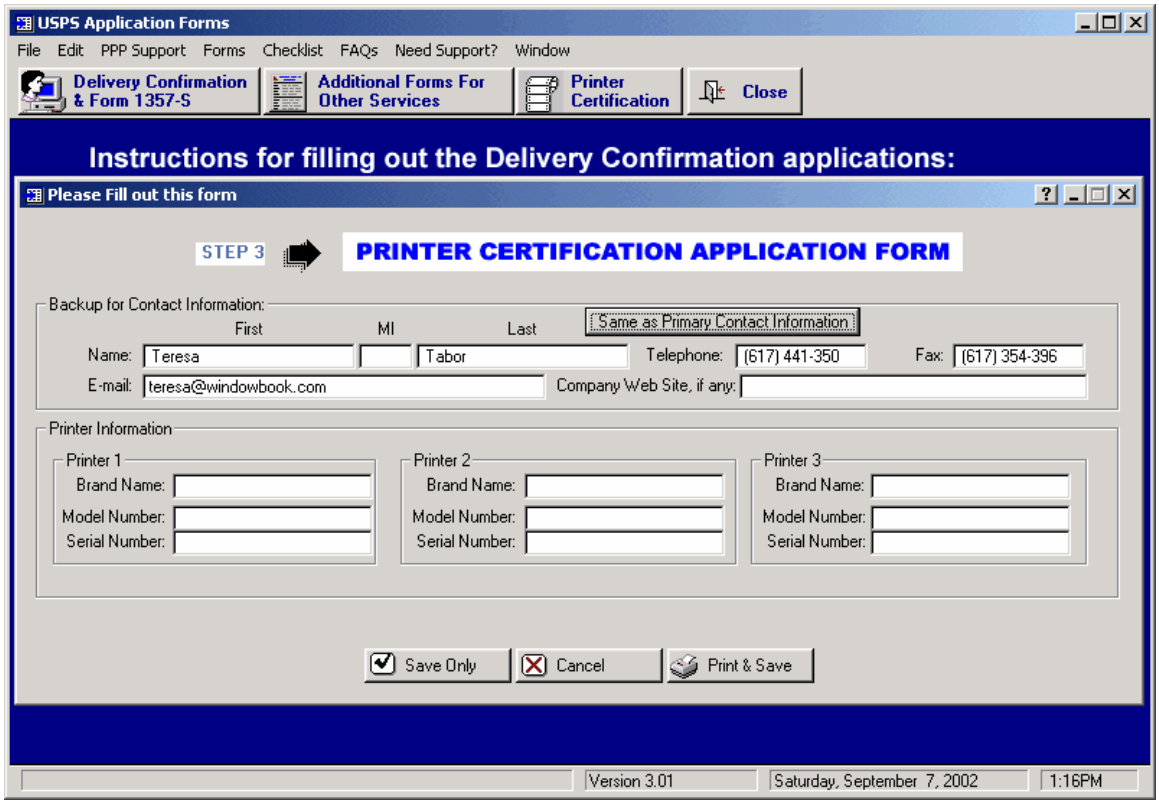
Get Label & File Certification From USPS

Within seven days of receipt of your completed Forms 1357-S and 5051, the USPS will fax you your User ID and Password and mail you a test kit. You will need to complete the Test and Certification process by printing test labels and communicating a test file to the USPS Server.

When you do this, you will also need to fill out the "Printer Certification Form" to include with your Sample Labels that you will be required to submit to USPS.

You can easily complete this form using the USPS Applications Form Filler Software. Click on the "Printer Certification" Icon. Then, click on the "Same as Primary Contact Information" button and the form filler will automatically populate some of the fields with the relevant information that you have already entered.



Next, enter the Name, Model and Serial Number of the printers you will use to print your labels.

Click the Print and Save button to preview and print your Printer Certification Form. You must submit this form, along with 20 test labels from each label printer you will be using, to the address at the bottom of the form.

Complete Manifest System Application

You can easily fill-out the Manifest System Application using the USPS Applications Form Filler Software.

When You Can Begin Shipping

Upon receipt of your labels and electronic test file, USPS will test both the quality of your labels and the content of your test file. Upon Approval, USPS will send you a copy of your Postal Form 3152.

Also, upon receipt of your Manifest System Application, a Representative from your local BMEU will conduct a Site Visit of your shipping location.

You are ready to ship as soon as you receive both the PS Form 3152 and approval by your local BMEU.

Installing PPP

Installing Pervasive.SQL

PSQL WorkGroup Installations

Single-User Installations

For this installation you simply run the Pervasive.SQL Installation from the CD and then reboot the computer to enable the SQL database engine. Print out the documentation included on the CD to help with the installation. If you have an existing Datmail, Postmaster or Postal Package Partner, the installation program will automatically apply a product license key. For new users you will receive the key once you have purchased your Datmail, PostMaster or Postal Package Partner. Note: Administrative Rights are required to complete the installation.

Network Installations

For 6 or more users on a network, the Pervasive.SQL Client/Server installation is required.

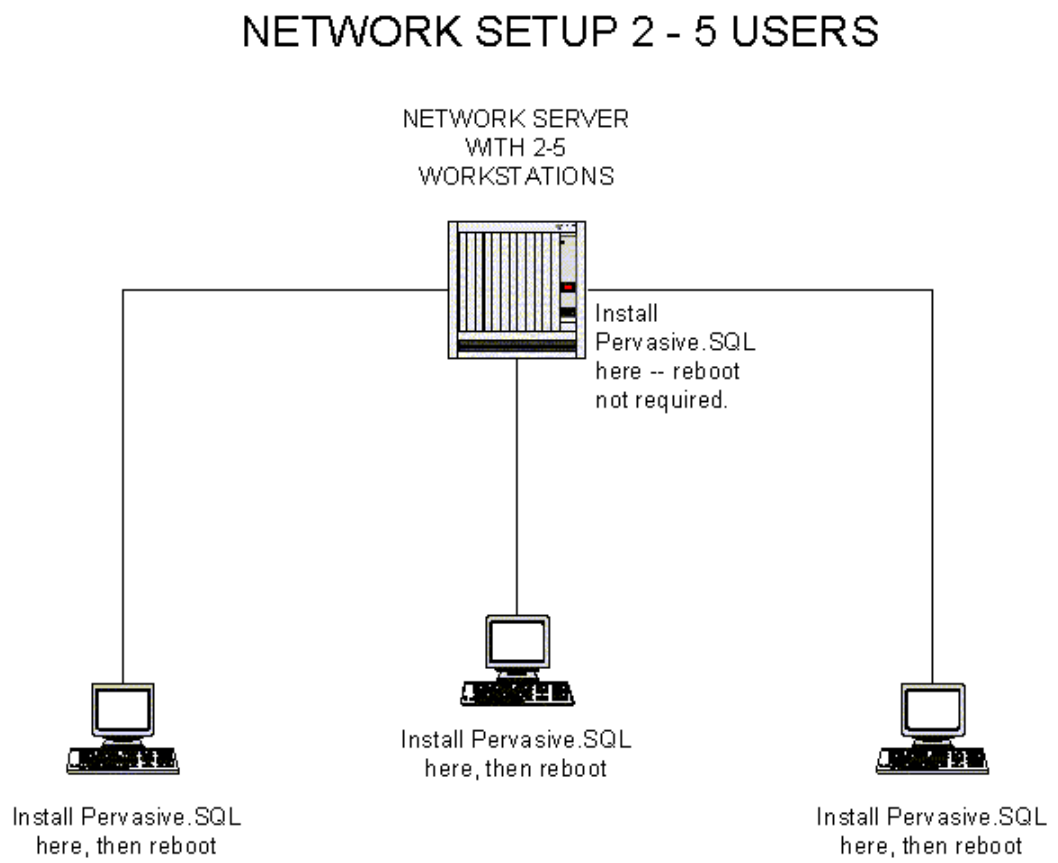
1. Install Pervasive.SQL on the Server. The installation is the same for both Network Server and Workstations.

2. Install Pervasive.SQL using the CD on each workstation.
Note that Administrative Rights are required to complete the installation.

3. After you have installed the program on a workstation, reboot the workstation to enable the database engine.

4. Configure Pervasive.SQL as a Permanent Gateway on the Server (see instructions below)

5. Install the WorkGroup Engine as a Service (see instructions below)



How to set up Pervasive.SQL as a Permanent Gateway (for 2-5 User Networks):

With Datmail/Postmaster 5.01 or higher or PPP 4.02 or higher installed and running on the Server:

1. Run the program from the Server

2. With the program running, right click on the following file in the program's data directory*:

~PVSW~.LOC

Please Note: For DAT-MAIL, you will need to launch the STATEMENTS side of the program by clicking on the 3602 icon in order to create the .LOC file

3. Click Properties -- make the file READ ONLY.

4. Close the file.

This makes the Server the Permanent Gateway.

* to find out what your data directory is, click on Help; About; More About; Environment

If you don't want to run the Dat-Mail, Post Master, or PPP Program from the Server, only run the data from the server:

1. Go to one of the workstations and run the program.

2. With the program open edit the ~PVSW~.LOC file using Notepad in Windows.

3. Put in the Server machine Network Identifier -
(This can be found under Start=> Settings => Control Panel=> System => Properties => Computer Name in Windows 2000).

4. Exit and Save the file in Notepad.

5. Make the ~PVSW~.LOC file READ ONLY by Right-clicking, then click Properties and choose Read Only.

This makes the Server the Permanent Gateway.

We are recommending that you set up their Server to be the Permanent Gateway. However, this does not require that you do this step on the Server itself. The key to remember here is that what you are actually trying to do

when setting up the Permanent Gateway is to edit the .LOC File to have the Server Name in it & then make it read-only. Making this file read-only will force the Server to always be the machine that serves up the data. This can be done from any machine, including a workstation because the .LOC file is located in the Data Directory of our program, which actually resides on the Server!
If you are running a network version of your Datmail or Postmaster 5.01 or higher or Postal Package Partner 4.02 or higher with 2-5 users we require that you set up the Server as the Permanent Gateway.

For more detailed information on configuring a Gateway and its advantages go to: http://www.goldstarsoftware.com/gateway.asp

Running the Workgroup Engine as a Windows Service

A tool that installs the Workgroup engine as a service is available on the Pervasive Component Zone web site. To download the tool, visit the following URL and select the "Toolbox - WGE as an NT Service." link.
http://www.pervasive.com/ComponentZone/Component/Lookup.asp?Function=ShowComponents&ID=6&Category=Tools+%2F+Utilities>

After downloading the file:

1. Place the tool in the BIN directory where your Pervasive files are installed.

2. Shut down your Workgroup engine.

3. Double-click PVSW.EXE to run the tool.

4. From the menu, choose Tools | WGE as a Service.

The next screen provides the option to install the Workgroup engine as a service. Before you do so, click Info and follow the instructions provided.

Citrix Installations

Supported Environments

You may install the Pervasive.SQL database engine in any of the following environments:
Windows NT 4 Terminal Server SP6a
Windows 2000 Terminal Server SP1
Windows NT 4 Terminal Server SP6a with Citrix MetaFrame 1.8
Windows 2000 Terminal Server SP1 with Citrix MetaFrame 1.8

Only one instance of the database engine may run on any terminal server platform. You cannot run separate copies of the database engine within two or more terminal sessions.

Installation

To install Pervasive.SQL on a terminal server, you must be logged into the terminal server as a user with system administrator rights.

Windows NT Server

Prior to installation, you must switch the terminal server to install mode using the change user /install command. This ensures that the software is available to all users after installation. When the installation is complete, you set the terminal server back to runtime mode using the command change user /execute.

Windows 2000 Server

Install Pervasive.SQL through Add New Programs (Start/Settings/Control Panel/Add/Remove Programs/Add New Programs). The operating system automatically handles the changing of terminal server modes.

PSQL Client/Server Installations

Windows Servers

Installing Server Components

Note: You must install the Pervasive.SQL Server for Windows at the server itself; you cannot install it remotely from a client machine.
To install Pervasive.SQL Server on a Windows machine:

1. Launch the installation program from your Windows machine:

    a. Insert the Pervasive.SQL Server for Windows CD in the CD-ROM drive of your Windows server.

    b. If the installation does not start automatically, click Start, select Run, and type <drive>:setup where <drive> is the drive letter of your CD-ROM device.
    The installation program begins its initial preparation. After the preparation completes, the Welcome screen appears.

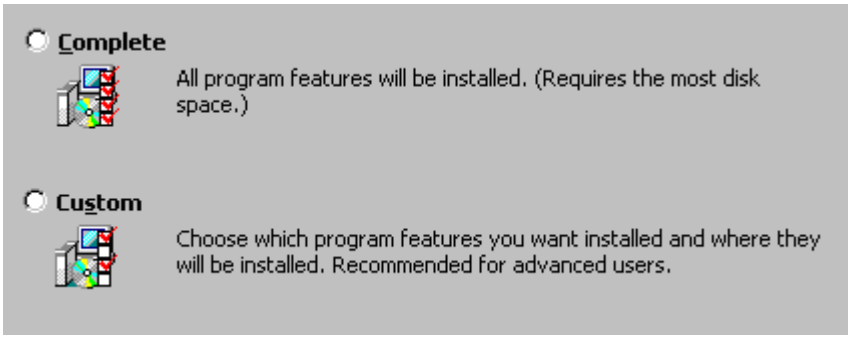
2. Click "Next" to proceed with the installation.

3. Read the Software License Agreement, and click "I accept the terms in the license agreement" to accept the terms of the agreement and enable the Next button.

4. Click "Next" -- A dialog will appear on which you specify a license key. The license key is provided by Window Book Inc. Contact Window Book if you do not have a valid license key.

5. Type or paste the license key into the License field.

6. Click on the Setup Type desired: Complete or Custom (the default is Complete).


Complete
All program features will be installed. (Requires the most disk space.)
Custom
Choose which program features you want installed and where they will be installed. Recommended for advanced users.

Note: "Complete Setup" is recommended. The Complete server installation installs the following components to drive C:

- Pervasive.SQL V8 engine (including ODBC interface)
- All client requesters (MS-DOS, Win32, and Linux Requesters)
- Utilities
- Transactional and Relational interfaces
- Client installation images
- Online documentation

7. Click "Next". A dialog appears that informs you the installation program is ready to begin installing files. Here you may click "Back" to change or review any of the installation settings, or "Cancel" to exit the installation.

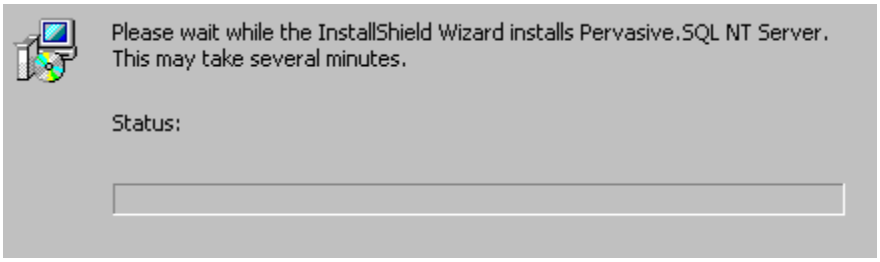
8. Click "Install" to continue with the installation.

9. Close any running applications that may interfere with the Pervasive.SQL installation. A dialog box appears if applications are running that can interfere with the installation of Pervasive.SQL.

If you had a previous version of Pervasive.SQL on your system, Pervasive System Analyzer archives it before installing the current version of Pervasive.SQL.

If installed files could not be copied because they were locked in memory, a reboot may be necessary at this point. Setup only prompts for a reboot if a locked file or some other event was detected that requires a reboot. Please reboot your system when prompted to do so in order to ensure proper operation of your Pervasive.SQL V8 product.

A dialog box appears that gives you a status of the installation process.



Installation actions include, but are not limited to, the following:

- Script operations
- Component registration
- File copying
- Shortcut creation
- System registry updates

A dialog appears at the end of a successful installation. Click "Finish" to complete the installation

After the installation is complete -- Registering and Testing

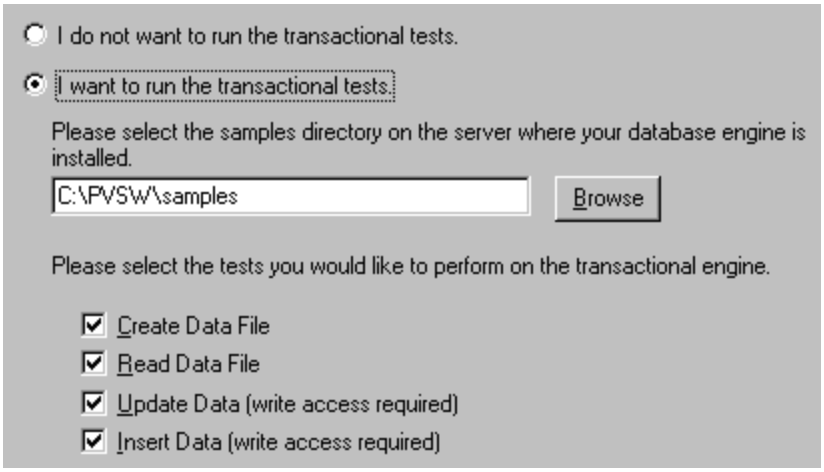
1. Registering your product.

If you would like to receive news about future updates, and other timely information, you may choose to register Pervasive SQL. You can also register later using a web, e-mail, or print-based registration form. When the product has been registered close the Registration page.

The Pervasive System Analyzer (PSA) starts and allows you to test of the transactional and relational interfaces. These tests ensure that your database engine is working as expected after installation.

2. ***Test the Transactional Engine.*** Testing is recommended to be sure your database engine is functioning properly. PSA performs a series of tasks to ensure that the transactional engine is working properly.

Transactional Engine Test


I do not want to run the transactional tests.
I want to run the transactional tests.
Please select the samples directory on the server where your database engine is installed.
C:\PVSW\samples
Browse
Please select the tests you would like to perform on the transactional engine.
Create Data File
Read Data File
Update Data (write access required)
Insert Data (write access required)

Click "Next" to run the tests and see the results.

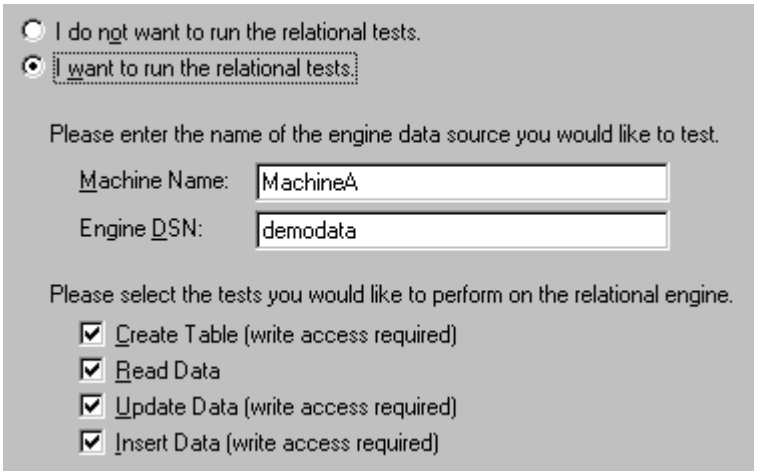
Note: It is recommended that you perform this test to ensure that the transactional engine is communicating properly and the transactional databases are functional.

3. Run the Transactional Test.

PSA displays a check mark for each test that passes and an X for each task that fails during the transactional engine test. A summary report is also provided in the information window.
Once your transactional engine tests are complete, click Next to test the relational engine.

4. Test the Relational Engine.

PSA performs a series of tasks to ensure that the relational engine is working properly.
Relational Engine Test


I do not want to run the relational tests.
I want to run the relational tests.
Please enter the name of the engine data source you would like to test.
Machine Name:
MachineA
Engine DSN:
demodata
Please select the tests you would like to perform on the relational engine.
Create Table (write access required)
Read Data
Update Data (write access required)
Insert Data (write access required)

Click “Next” to run the tests and see the results.

Note: It is recommended that you perform this test to ensure that the relational engine is communicating properly and the relational databases are functional.

5. Run the Relational Test. PSA displays a check mark for each test that passes and an X for each task that fails during the relational engine test. A summary report is also provided in the information window.

6. After the relational engine tests are complete, click Finish to exit the PSA test.
Now you are ready for Step 2 – Installing the Client Components on each workstation.

Installing Client Components

When you have completed the Server installation, map the server you will be installing from to a drive letter on the workstation.

1. Click Start=>Run, then type <drive>:\pvsw\clients\win32\setup where <drive> is the drive letter to which the server is mapped. (If this folder is not visible from the Workstation put the files contained in this folder in a directory that can be seen from the workstation and run setup from there). The installation program begins its initial preparation. After the preparation completes, the Welcome screen appears.

2. Click “Next” to proceed with the installation.

3. Click on "Complete" to choose the “Complete” Setup. The Complete Client Installation installs the following components to the local machine:

- Transactional and relational interfaces
- Client requesters (DOS, Trace, and Win32 requesters)
- Utilities
- Online documentation

4. Click “Next” -- A dialog will appear that informs you the installation program is ready to begin installing files. Click “Install” to continue with the installation.

5. If required, close any running applications that may interfere with the Pervasive.SQL installation. A dialog box will appear if applications are running that can intefere with the installation of Pervasive.SQL. Exit all of the programs that may interfere, then click Next.

Note: Next will not proceed with the installation unless you exit all programs that may interfere.

If you had a previous version of Pervasive.SQL clients on your system, Pervasive System Analyzer will archive it before installing the current version.

Note: If installed files could not be copied because they were locked in memory, a reboot may be necessary at this point. Setup only prompts for a reboot if a locked file or some other event was detected that requires a reboot. Please reboot your system if prompted to do so in order to ensure proper operation of your Pervasive.SQL V8 product.

A dialog appears that shows the status of the installation process:

<Insert Screen Shot >

Installation actions include, but are not limited to, the following:

- Script operations
- Component registration
- File copying
- Shortcut creation
- System registry updates

A dialog will appear at the end of a successful installation. Click "Finish" to complete the installation.

TESTING

Testing is not required but it is strongly recommended to be sure that the Pervasive.SQL Database Engine is running properly.

1. Testing the network communications from the client machine to the machine running Pervasive.SQL Server. For Target Machine, you must type the name or IP address of the machine running Pervasive.SQL Server.

The following example shows that the machine name is MachineA.

Click "Next."

The communication test transmits a series of test messages between the two machines.
After all test messages are transmitted and received correctly, a dialog confirms that 75 messages were successfully transmitted. Click "Next" to continue.

2. Testing the Transactional Engine.

PSA performs a series of tasks to ensure that the transactional engine is working properly.
Transactional Engine Test

Click Next to run the tests and see the results.

Note: It is recommended that you perform this test to ensure that the transactional engine is communicating properly and the transactional databases are functional.

3. Run the Transactional Test.

PSA displays a check mark for each test that passes and an X for each task that fails during the transactional engine test. A summary report is also provided in the information window, as shown in the following figure.

Once your transactional engine tests are complete, click Next to test the relational engine.

4. Testing the Relational Engine.

PSA performs a series of tasks to ensure that the relational engine is working properly.
Click Next to run the tests and see the results.

Note: It is recommended that you perform this test to ensure that the relational engine is communicating properly and the relational databases are functional.

5. Run the Relational Test.

PSA displays a check mark for each test that passes and an X for each task that fails during the relational engine test. A summary report is also provided in the information window, as shown in the following figure.

Relational Engine Test Results from PSA

6. After the relational engine tests complete, click Finish to exit the PSA test.
Restarting Your Computer After Installation

You should restart your Windows machine at the end of the installation process if any of the following are true:

- The installation program prompts you to reboot. This may be due to installed files that could not be copied because they were locked in memory.

- You are using Windows 98 or Windows ME

Novell Servers

Platform Notes For Netware

This document contains information that may be helpful in installing Pervasive.SQL V8 on a NetWare server.

Native file access protocols (NFAP) is a feature of NetWare 6.0 (and a beta product for NetWare 5.1). This feature allows workstations to access and store files on NetWare servers without requiring a Novell Client or the Microsoft Client Service for NetWare. NFAP uses the same protocol (referred to as native) as the client workstation to copy, delete, move, save, and open files. Windows workstations perform these tasks using the Common Internet File System (CIFS) protocol.

Note that Pervasive.SQL V8 supports NFAP even though the feature is new with NetWare 6.0. You do not have to change the default settings for the Pervasive.SQL engines or clients to take advantage of NFAP. However, the following items do apply to the use of NFAP: " The MicroKernel authentication uses Pervasive.SQL runtime server support (RTSS). The MicroKernel uses the NDS password; it does not use the simple password feature of NFAP. (The default setting for RTSS is "Complete," meaning that a user must supply a valid user name. A password is optional.)

If you customize the network environment with a CIFS.CFG file, use the -SHARE parameter to point to the root of the volume. That is, do not use the -SHARE parameter to point directly to the Pervasive.SQL data files. The MicroKernel resolves locations specified by the -SHARE parameter only if the share points to the root of the volume.

If your Windows client is running the Advanced Power Management feature of the operating system, disable it while installing Pervasive.SQL V8. The power management can cause a Pervasive.SQL V8 installation to fail if the client that is remotely installing the NetWare server is suspended during the install.

Because some versions of NetWare include Btrieve 6.10, Btrieve system files already exist on the server and possibly on the clients. Back up these files and then remove them. If you do not remove them, set them to read/write so that the installation can overwrite them (the installation routine also backs them up). Refer to Btrieve 6.10 documentation for a component list.

To install Pervasive.SQL V8, you must have rights to the SYS: volume and to the System directory on the server on which the product is being installed.

The Pervasive.SQL server component is installed in the System directory of the SYS: volume, and all other supporting files are installed, by default, to

subdirectories of the PVSW directory in the root of the SYS: volume (as described in "What Files Are Installed as Part of Pervasive.SQL V8?" on page 8-19 of the Getting_Started_Server.pdf)

Note: NetWare versions below NetWare 4.11 are not supported.

NetWare 4.x only: Ensure that the CPU Hog Timeout setting is a value greater than or equal to 60 seconds or you may encounter a server abnormal ending (abend) when installing Pervasive.SQL V8. The default value is 60 seconds. In addition, Unicode must be installed on the NetWare machine.

NetWare 5.1 only: The command file AUTOEXEC.NCF for NetWare 5.1 includes an entry that launches another command file named SQLC.NCF. The command file SQLC.NCF loads a version of ODBC.NLM that is incompatible with Pervasive.SQL. On NetWare 5.1, it is necessary to comment out the line containing SQLC.NCF in your AUTOEXEC.NCF file. Otherwise, you will encounter errors when using Pervasive.SQL Control Center or performing SQL operations. Btrieve is unaffected by this issue.

In all versions of NetWare, before starting Pervasive.SQL V8 the NetWare Loadable Module appropriate to the communication protocol being used must be loaded before starting Pervasive.SQL V8. If the SPX communication protocol is being used, then SPXS.NLM must be loaded on the server before starting Pervasive.SQL V8. If the TCP/IP protocol (the default) is being used, then TCP/IP must be correctly configured on the server before starting Pervasive.SQL V8. Prior to installing Pervasive.SQL V8, any existing Pervasive.SQL applications must be stopped on the client machines.

Running the NetWare install from a Windows 2003 machine can produce Windows security warning messages that reference files install is trying to copy. If you receive such dialogs starting with "Some files can harm your computer", click Open and Install will complete normally.

If you have any trouble with the following installation, see Chapter 21, "Troubleshooting After Installation" of the Getting_Started_Server.pdf located in the \books directory of the installation CD.

Installing Over Existing Pervasive Products

Your previous versions of Pervasive products will be archived when you install Pervasive.SQL V8 so that there are no component conflicts. You can use Pervasive System Analyzer later to restore the archived products if necessary. Your licenses from previous Pervasive products such as Btrieve 6.x, Scalable SQL 4.x, and Pervasive.SQL 2000 will not be migrated to Pervasive.SQL V8.

If you wish to make use of all the new version features, you must rebuild your data files so they use the version 8 file format. See the Advanced

Operations Guide section for detailed information on how to use the Rebuild utilities to convert your data files.

Installation Tips

When installing Pervasive.SQL V8 for the first time on a system, Setup will check if all of the needed system files meet the minimum requirements. In some cases, these files are locked by the operating system and a reboot is required before Setup can continue. A dialog box is displayed if this is the case. Click Yes to reboot the system. Setup is then automatically restarted.

Note: It is strongly recommended that you reboot your system if you encounter this message. If you do not reboot your system, Setup will encounter failures during engine and utilities configuration.

Rights Required to Install

To install Pervasive.SQL V8 on a NetWare server you should be an administrator of the server on which you are installing the database. Just having supervisor rights is not adequate. This will allow you to configure, monitor, and set up DSNs for the server after installation. However, you can do an installation if you just have read/write rights to the root of the server, but you will not be allowed to configure, monitor, or add DSNs. In addition to the rights required on the NetWare server, you must have administrative rights on the Windows machine from which you are installing the Pervasive.SQL V8 NetWare server.

Easiest Method to Authorize Users to Administer Databases

All other users that are administrators for the NetWare server object where Pervasive.SQL V8 is installed will have rights to perform administrative functions on the database too. This means the user must have Supervisor rights to the NDS Server itself, not just Supervisor rights to the SYS: volume. This implementation is the easiest to set up and administer and is adequate if your users can be administrators for both the NetWare server and the

Pervasive.SQL V8 database

Alternative and More Restrictive Method to Authorize Users to Administer Databases
After installation, you can optionally add a group named Pervasive_Admin and add members who have the right to administer only the database engine without giving them full administrative rights on the entire server. To add this group and users to it, you must have the proper Novell NetWare rights enforced to add objects into the NDS tree on NetWare 4.11 or later. On NetWare 4.x or later, the Pervasive_Admin group object must be set up in the same NDS container as the server (or servers) with Pervasive.SQL V8 installed. If all your Pervasive.SQL V8 servers are installed at the same level in your NDS tree, then only one Pervasive_Admin group is required for all of them.

Here are examples of the correct and incorrect level for Pervasive_Admin. In the examples, the database engine is running on the NetWare server named "Psql."

Correct Level

0 [Root]
| - Container A
| - Group A

| - Psql
| - Server2
| - Pervasive_Admin (Group)
| - Group B
| - Juaquin
| - Steve
| - Tawanda

Wrong Level

0 [Root]
| - Container A
| - Group A
| - Psql
| - Server2
| - Group B
| - Juaquin
| - Pervasive_Admin (Group) – Wrong level
| - Steve
| - Tawanda

If you have multiple Pervasive.SQL V8 servers at varying levels in your NDS tree, you must set up multiple Pervasive_Admin groups, one for each NDS context level running a Pervasive.SQL engine. You do not need to have the same member list for each Pervasive_Admin group.

Note: If the Pervasive_Admin group is created at a lower level in the NDS tree than the Novell server to which it corresponds, members of the group cannot access the database engine unless they have Novell administrator rights. The attempted login to the Pervasive.SQL server from the PCC fails with the message “You have entered an invalid password or user name.”

If you have additional questions on this topic or would like to review examples of NDS trees and user rights, please refer to the section "Additional Information on Pervasive_Admin and NDS" in the HTML file:
http://www.pervasive.com/support/updates/psqlall.asp#NetWare
TurboFat on NetWare Servers

On NetWare 4.x, 5.x, and 6.x servers, data files can become corrupt in the NetWare cache or Turbo cache. The actual data file on the disk is fine, and if you rebuild the data file you will not lose any records. If you do lose records while rebuilding, that would indicate true corruption and not the turbo cache problem. One workaround has been to down the server to clear the cache. This can be used as a test as well by getting a status 2 on a read of a record, downing the server to clear the cache, and then reading that same record again. If you can read it successfully, it is a good indication that the problem is in the turbo cache. This issue is not unique to Btrieve files; it can be any

type of file that Novell loads into its cache. There are 2 possible workarounds for this situation:

Workaround #1: Disable NetWare's Turbo cache This can be done by using TURBOD2.EXE from Novell. See Novell's document TID 2960009 "TURBODIS.NLM to prevent database corruption" for more information. Its properties say it is for troubleshooting purposes and is not officially tested or supported. Experience has shown that this does not always eliminate the problem.

Workaround #2: Serialize all I/O on a 'per file' basis in the NetWare MicroKernel.
The avoids the problem and has had outstanding results. It serializes all I/O on a per file basis in the NetWare MicroKernel. There have been no reports of this causing any problems or performance issues, so it is recommended to everyone.

To implement this workaround, follow these steps.

1. Edit the file SYS:SYSTEM\BTI.CFG

2. In the section titled [MicroKernel] find the Use FileIO Mutex setting and set it to YES as shown in this example:

Use FileIO Mutex=YES

(Note the capital letter 'I' and capital letter 'O').

3. Ensure that there is not a second entry anywhere else that sets it to No.

4. Restart the server for this change to take effect.

Cache Allocation Size

Beginning with NetWare 5.1, Novell deliberately sets the default Pervasive.SQL memory cache size to 1 MB, which is far too small for most applications. After you install Pervasive.SQL, you should set the Cache Allocation Size configuration parameter to 20% of the physical memory on the NetWare server, to avoid poor database performance. To access this configuration parameter within PCC, double-click the icon representing the NetWare server, double-click the Configuration, double-click Server, then Performance Tuning. Double-click on Cache Allocation Size and set the value in bytes.

Installing Server Components

You cannot install the NetWare server from the local console. You must install the Pervasive.SQL for NetWare server remotely from a Windows client machine on which you have administrative rights.

Note: If the installation fails before the program copies any files to the target installation directory, the installation log file (install.log) can be found in the directory specified by the %TEMP% environment variable. This directory is often c:\windows\temp or c:\winnt\temp.

To install Pervasive.SQL on a NetWare server

1. Map a drive letter to the remote server

    a. Double-click My Computer. If the toolbar is not visible, click View and select Toolbar. Click the Map Network Drive button.

    b. Map a drive letter to the SYS: volume on the remote server as shown in the Map Network Drive dialog box.

2. Launch the installation program from a client workstation.

    a. Insert the Pervasive.SQL V8 Server for NetWare CD in the CD-ROM drive of your client machine.

    b. If the installation does not start automatically, click Start => Run, then type drive:setup where drive is the drive letter of your CD-ROM device.

    The installation program begins its initial preparation. After the preparation completes, the Welcome screen appears.

3. Click Next to proceed with the installation.

4. Read the Software License Agreement and click I accept the terms in the license agreement to accept the terms of the agreement and enable the Next button.

5. Click Next. A dialog appears for entering your license key. This key is provided by Window Book Inc. If you do not have a license key contact Window Book.

6. Type, or paste, a license key into the License field.
Your Pervasive.SQL V8 Server is set to the number of users specified in the license key. When the update is complete, a dialog box informs you that you

have increased your user count license to support that number of simultaneous users.

7. Click on the Setup Type desired: Complete or Custom (the default is complete).

Note: For either setup type, Complete or Custom, the Pervasive.SQL online documentation and Pervasive System Analyzer (PSA) are installed locally. That is, on the Windows machine from which you are installing Pervasive.SQL Server for NetWare. The local components are installed to osdrive:\Program Files\Common Files\Pervasive Software Shared, where osdrive is the drive letter where your operating system is installed.

Complete Setup (recommended)

The Complete installation, which is recommended, takes default actions for operations performed during the installation.

The system components for the Pervasive.SQL Server engine are copied by default to SYS:\SYSTEM. You can specify a different location for the system components. The non-system components are copied by default to SYS:\PVSW. You can select a different location for the non-system components. The Complete server installation installs the following components to SYS:SYSTEM:

8. Pervasive.SQL V8 engine (including ODBC interface). The Complete server installation installs the following non-system components to SYS:PVSW:

- Script files
- Client installation copies
- DEMODATA sample database
- NIS files
- Sample files

Custom Setup (not recommended)

If you need to do a Custom Setup consult the user manual (Getting_Started_Server.pdf) located in the \books directory of the Installation CD, Section 8. Note: The Custom installation is for advanced users. It allows you to specify the installation location, select the components to install, and determine the space requirements for the components. If you choose Custom install, read "Custom Installation Path" in the Getting_Started_Server.pdf on page 8-15. At the end of that section return to this set of steps to continue the installation.

9. Click Next.

10. Specify the location for the system files. The default location is SYS:SYSTEM. If you want to change the default location, click Change, specify a location, then click OK. In the following example dialog, the SYS: volume is mapped to drive letter P.

11. Click Next.

12. Specify the location for the non-system files (called the PVSW install folder). The default location is SYS:PVSW. If you want to change the default location, click Change, specify a location, then click OK. In the following example dialog, the SYS: volume is mapped to drive letter P.

13. Click Next. At this point, if you want, you may click "Back" to change or review any of the installation settings, or click Cancel to exit the installation program.

14. Click Install to continue. If you had a previous version of Pervasive.SQL on your system, Pervasive System Analyzer archives it before installing the current version of Pervasive.SQL. A dialog appears that gives you a status of the installation process.

Installation actions include, but are not limited to, the following:

- Script operations
- Component registration
- File copying
- Shortcut creation
- System registry updates

A dialog appears at the end of a successful installation.

15. Click Finish.

Caution: To avoid poor database performance on NetWare 5.1 and later, follow the instructions provided under "Cache Allocation Size" on page 8-8 in the Users Guide to increase Novell's factory setting for the database engine cache size.

16. Start Pervasive.SQL on your NetWare machine by performing a DOWN command followed by a SERVER command on the NetWare server. You must

restart the NetWare server to load the new version of BTRIEVE.NLM. The NetWare operating system has dependencies on BTRIEVE.NLM.

17. This completes the installation.

Installing Client Components

When you have completed the Server installation, map the server you will be installing from to a drive letter on the workstation.

1. Click Start=>Run, then type <drive>:\pvsw\clients\win32\setup where <drive> is the drive letter to which the server is mapped. (If this folder is not visible from the Workstation put the files contained in this folder in a directory that can be seen from the workstation and run setup from there). The installation program begins its initial preparation. After the preparation completes, the Welcome screen appears.

2. Click “Next” to proceed with the installation.

3. Click on "Complete" to choose the “Complete” Setup. The Complete Client Installation installs the following components to the local machine:

- Transactional and relational interfaces
- Client requesters (DOS, Trace, and Win32 requesters)
- Utilities
- Online documentation

4. Click “Next” -- A dialog will appear that informs you the installation program is ready to begin installing files. Click “Install” to continue with the installation.

5. If required, close any running applications that may interfere with the Pervasive.SQL installation. A dialog box will appear if applications are running that can intefere with the installation of Pervasive.SQL. Exit all of the programs that may interfere, then click Next.

Note: Next will not proceed with the installation unless you exit all programs that may interfere.

If you had a previous version of Pervasive.SQL clients on your system, Pervasive System Analyzer will archive it before installing the current version.

Note: If installed files could not be copied because they were locked in memory, a reboot may be necessary at this point. Setup only prompts for a reboot if a locked file or some other event was detected that requires a reboot. Please reboot your system if prompted to do so in order to ensure proper operation of your Pervasive.SQL V8 product.

A dialog appears that shows the status of the installation process:

Installation actions include, but are not limited to, the following:

- Script operations
- Component registration
- File copying
- Shortcut creation
- System registry updates

A dialog will appear at the end of a successful installation. Click "Finish" to complete the installation.

TESTING

Testing is not required but it is strongly recommended to be sure that the Pervasive.SQL Database Engine is running properly.

1. Testing the network communications from the client machine to the machine running Pervasive.SQL Server. For Target Machine, you must type the name or IP address of the machine running Pervasive.SQL Server.

The following example shows that the machine name is MachineA.

Click "Next."

The communication test transmits a series of test messages between the two machines.
After all test messages are transmitted and received correctly, a dialog confirms that 75 messages were successfully transmitted. Click "Next" to continue.

2. Testing the Transactional Engine.

PSA performs a series of tasks to ensure that the transactional engine is working properly.
Transactional Engine Test

Click Next to run the tests and see the results.

Note: It is recommended that you perform this test to ensure that the transactional engine is communicating properly and the transactional databases are functional.

3. Run the Transactional Test.

PSA displays a check mark for each test that passes and an X for each task that fails during the transactional engine test. A summary report is also provided in the information window, as shown in the following figure.

Once your transactional engine tests are complete, click Next to test the relational engine.

4. Testing the Relational Engine.

PSA performs a series of tasks to ensure that the relational engine is working properly.
Click Next to run the tests and see the results.

Note: It is recommended that you perform this test to ensure that the relational engine is communicating properly and the relational databases are functional.

5. Run the Relational Test.

PSA displays a check mark for each test that passes and an X for each task that fails during the relational engine test. A summary report is also provided in the information window, as shown in the following figure.

Relational Engine Test Results from PSA

6. After the relational engine tests complete, click Finish to exit the PSA test.

Restarting Your Computer After Installation

You should restart your Windows machine at the end of the installation process if any of the following are true:

- The installation program prompts you to reboot. This may be due to installed files that could not be copied because they were locked in memory.

- You are using Windows 98 or Windows ME

Note: This section contains information that you should read after running the installation program.

How Do I Use NetWare Directory Services (NDS) with Pervasive.SQL V8?

For information on Pervasive.SQL support of NDS, see the topic "NetWare Directory Services (NDS) Formats" on page 18-7. More documentation on how NDS relates to Pervasive.SQL is available in the Knowledge Base of Pervasive's Home Page (http://support.pervasive.com/kb). Search using the keyword "NDS" on the Support section of the site.

How Do I Read the Online Documentation?

Pervasive.SQL V8 documentation for Win32 platforms is in Microsoft HTML Help format. To read the documentation, select Start=>Programs=>Pervasive.SQL V8=> Documentation=>Pervasive.SQL V8 from the Windows Start menu. You can also view the documentation in the form of Adobe Acrobat (PDF) files. These PDF files are available on the Pervasive.SQL V8 (Server Edition) CD-ROM. There is also a README file on the distribution media that has the latest changes and additions to Pervasive.SQL V8.

What Files Are Installed as Part of Pervasive.SQL V8?

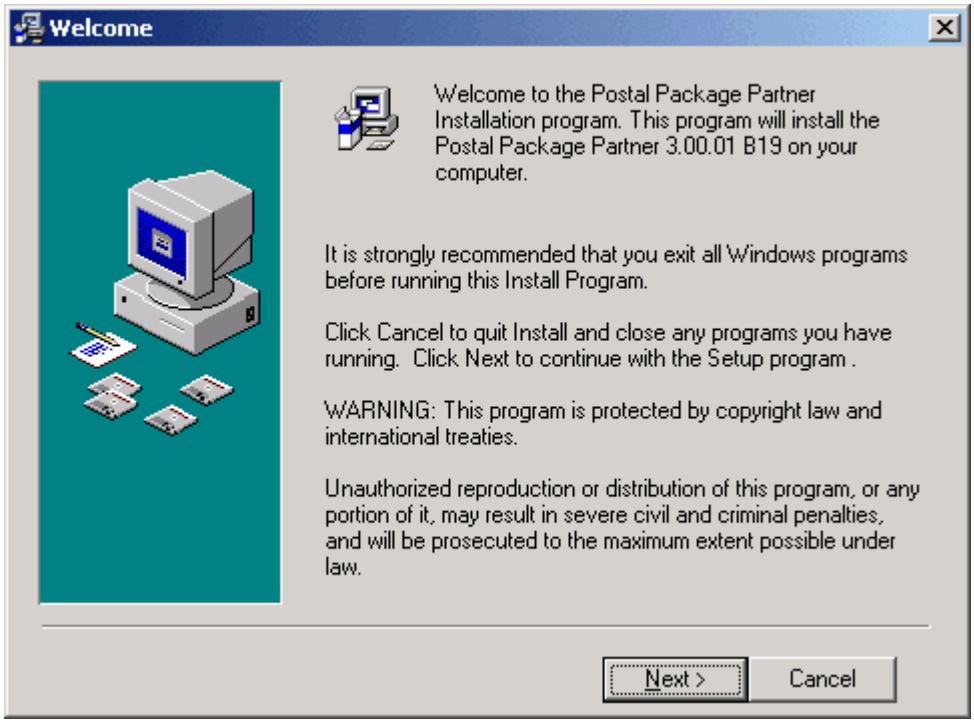
Once installed, the Pervasive.SQL files reside in the following directory structure. This structure is located on the SYS volume on the Windows machine from which you installed Pervasive.SQL Server for NetWare:

\SYSTEM NLMs and all other system files
\PVSW
\BIN
\CLIENTS Pervasive.SQL client setup programs
\DOS DOS Pervasive.SQL Requester files. These files must be manually copied to a DOS client.
\TRACE Requester files for Windows 32-bit operating systems and the Pervasive.SQL Windows client installation program
\WIN32 Pervasive.SQL Windows client installation program
\DEMODATA A sample SQL database.
\SAMPLES Sample data file SAMPLE.BTR and sample alternate collating sequence file UPPER.ALT. This database is the default database fo Btreive security.
This structure is located on the Windows machine from which you installed Pervasive.SQL Server for NetWare:
C:\Program Files\Common Files\Pervasive Software Shared

\PSA Pervasive System Analyzer
\DOC Online documentation
\PVSWCORE Pervasive Services

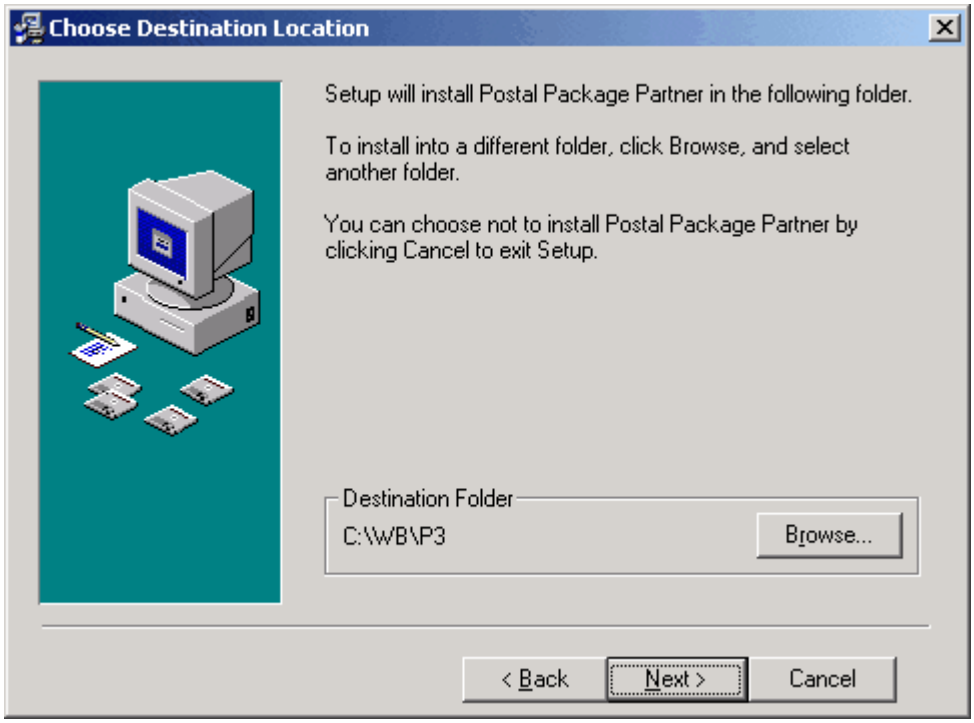
Installing Postal Package Partner

Prior to starting the installation, exit all Windows programs. If this is a Network Installation, MAKE SURE all users have shut down any Window Book programs and restrict access until the installation is complete. Click on "Next" for the License Agreement. Read it, then click on the "I Agree" Button to proceed.


Welcome
Welcome to the Postal Package Partner Installation program. This program will install the Postal Package Partner 3.00.01 B19 on your computer.
It is strongly recommended that you exit all Windows programs before running this Install Program.
Click Cancel to quit Install and close any programs you have running. Click Next to continue with the Setup program .
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

The next screen asks you to choose Standalone (Local) or Network Installation.

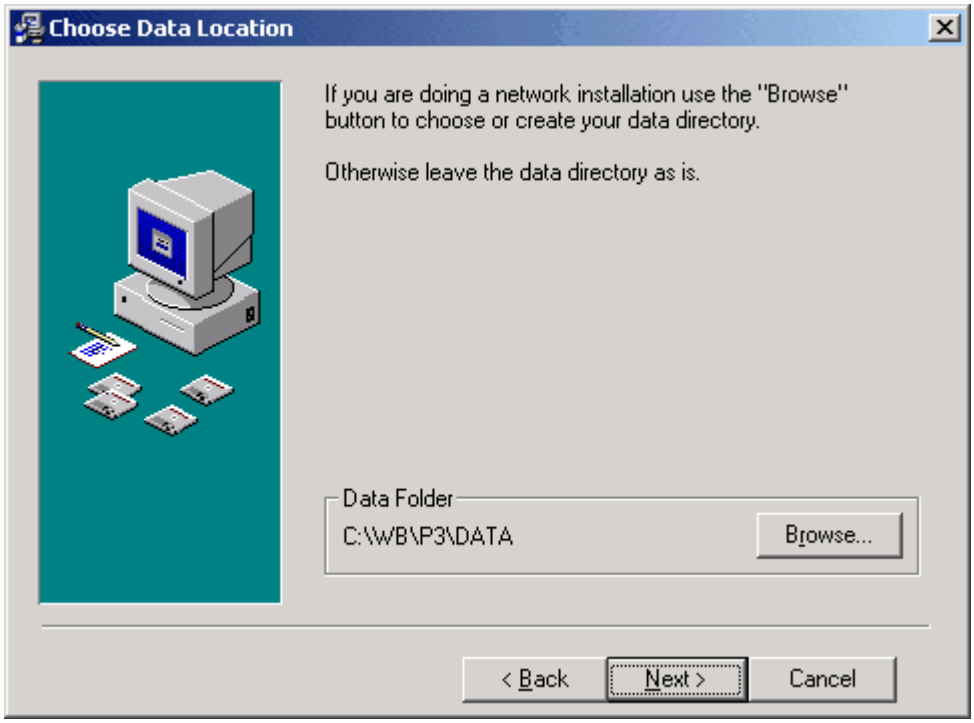
1. Standalone Installation:
You will first be prompted for the program installation path. You should accept the default unless there is a very compelling reason not to.


Choose Destination Location
Setup will install Postal Package Partner in the following folder.
To install into a different folder, click Browse, and select another folder.
You can choose not to install Postal Package Partner by clicking Cancel to exit Setup.
Destination Folder
C:\WB\P3
Browse...
< Back
Next >
Cancel

Next, you will be prompted for the installation path. It automatically selects the recommended normal path for a Standalone Installation.

NOTE: Do NOT attempt to use Postal Package Partner on more than one computer unless you have the Network Version and are sharing the data, for the following reason:

Using the program on separate computers without sharing the data will result in duplicate PIC numbers, duplicate Electronic Manifest Numbers and destroy the integrity of the tracking process.


Choose Data Location
If you are doing a network installation use the "Browse" button to choose or create your data directory.
Otherwise leave the data directory as is.
Data Folder
C:\WB\P3\DATA
Browse...
< Back
Next >
Cancel

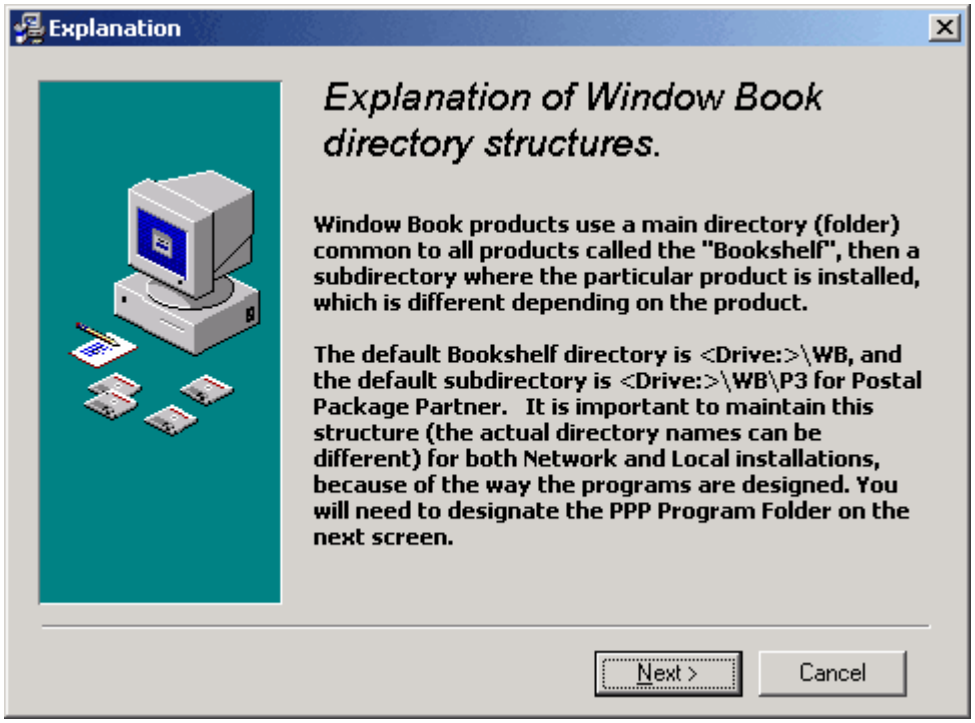
Continue on and follow the prompts to complete the installation. If this is a new installation, you will be prompted to enter your Registration. See the section on Registering PPP for more details.

2. Network Installation:
1. First, install Postal Package Partner on the server. Before the installation you must map your network drive to a logical drive letter (i.e. P:\) in place of a server name (i.e. \\Server1\). Then, follow the same steps in the Standalone Installation Section but you should specify a network drive for the installation directory.
2. Next, you will need to run the Network Workstation Utility on all other computers that will be using Postal Package Partner.

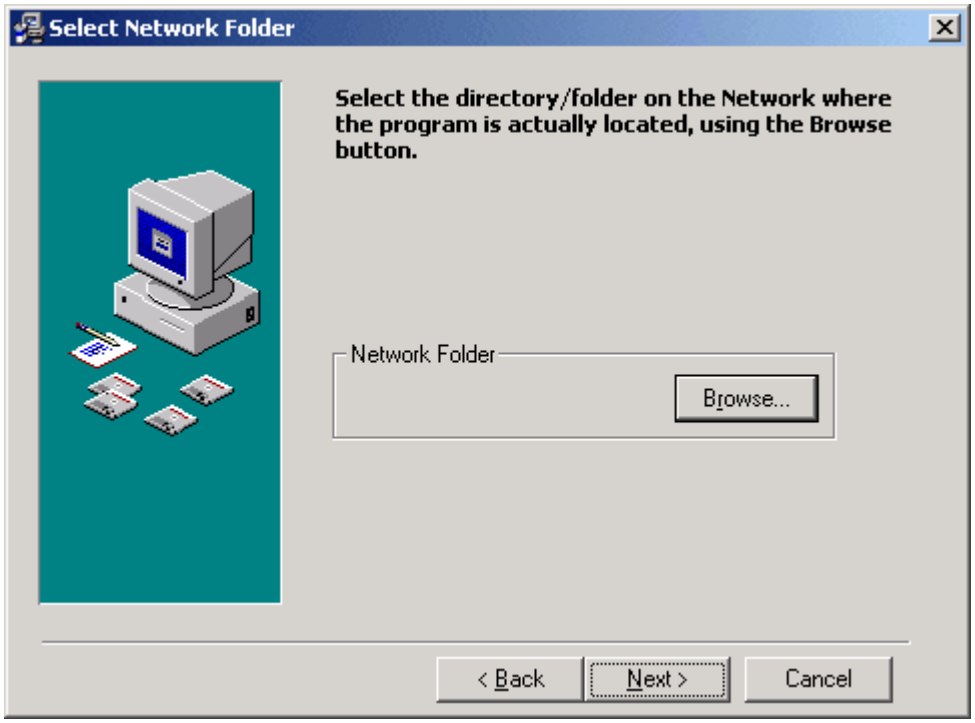
Network Utility
Download the Workstation Utility from the Window Book web site by clicking here.

Prior to running this utility, it is important to take a moment to learn about Window Book's Directory Structures.
It is important to maintain this structure (the actual directory names can be different) because of the way the programs are designed.

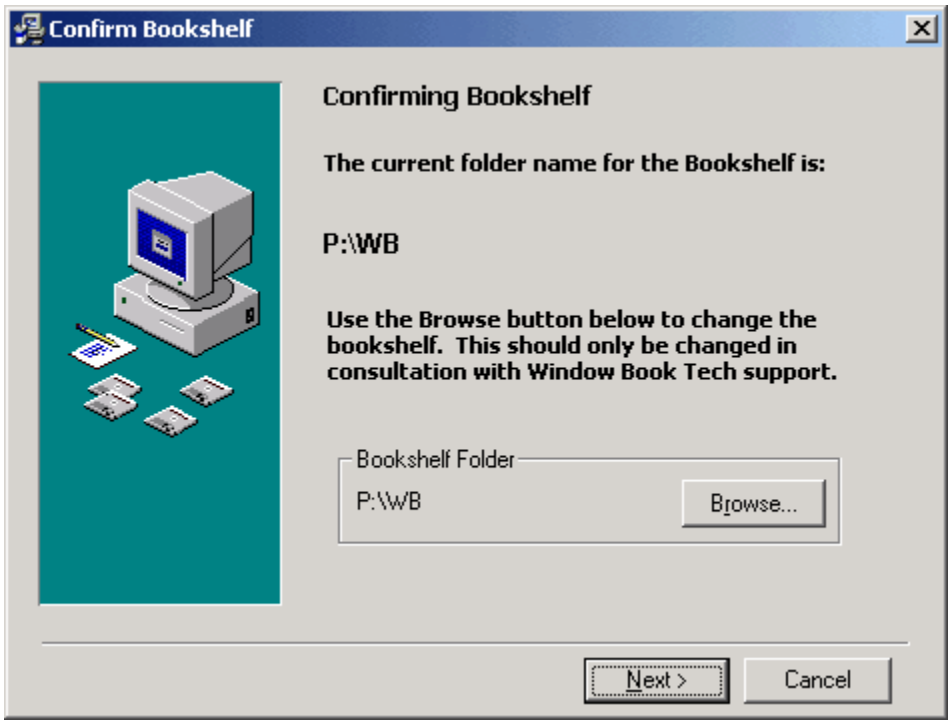
Window Book products use a main directory folder common to all of our products called "Bookshelf", then a subdirectory where each product is installed, which is different depending on the product. The default Bookshelf directory is <Drive:>\wb and the default subdirectory for Postal Package Partner is <Drive:>\wb\p3.


Explanation
Explanation of Window Book directory structures.
Window Book products use a main directory (folder) common to all products called the "Bookshelf", then a subdirectory where the particular product is installed, which is different depending on the product.
The default Bookshelf directory is <Drive:>\WB, and the default subdirectory is <Drive:>\WB\P3 for Postal Package Partner. It is important to maintain this structure (the actual directory names can be different) for both Network and Local installations, because of the way the programs are designed. You will need to designate the PPP Program Folder on the next screen.
Next >
Cancel

The first setting you will be prompted for is the drive on the Network where the program is located. Here you should choose the subdirectory for Postal Package Partner. For example, if you are using the default directories, you would browse to and select <Drive:>\wb\p3.


Select Network Folder
Select the directory/folder on the Network where the program is actually located, using the Browse button.
Network Folder
Browse...
< Back
Next >
Cancel

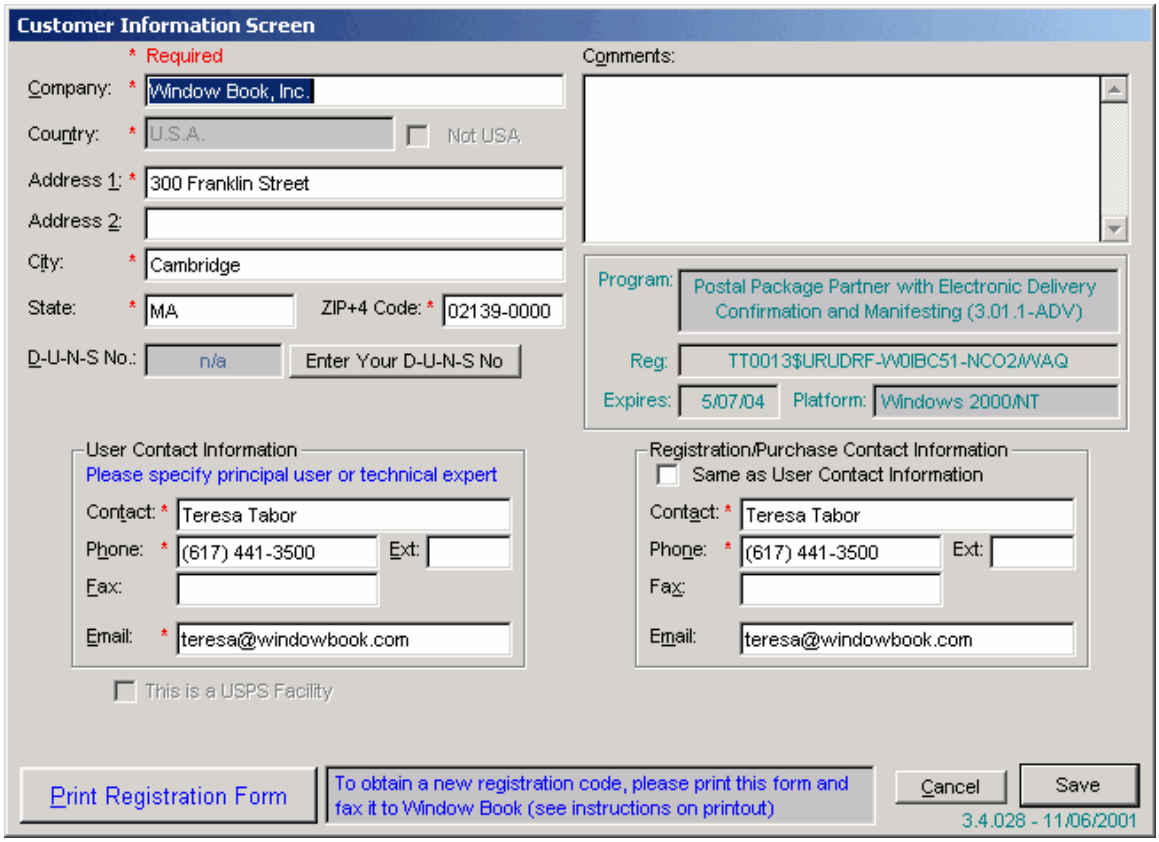
Next, you will be prompted to confirm your Bookshelf Directory. It is important to make sure that this directory is correct. If you are using the default directories, this will be <Drive:>\wb.


Confirm Bookshelf
Confirming Bookshelf
The current folder name for the Bookshelf is:
P:\WB
Use the Browse button below to change the bookshelf. This should only be changed in consultation with Window Book Tech support.
Bookshelf Folder
P:\WB
Browse...
Next >
Cancel

After clicking the "Next" Button you will be informed that your Network Installation was successful and be prompted to click on the Finish Button to exit the Workstation Utility Program.

Registering Postal Package Partner

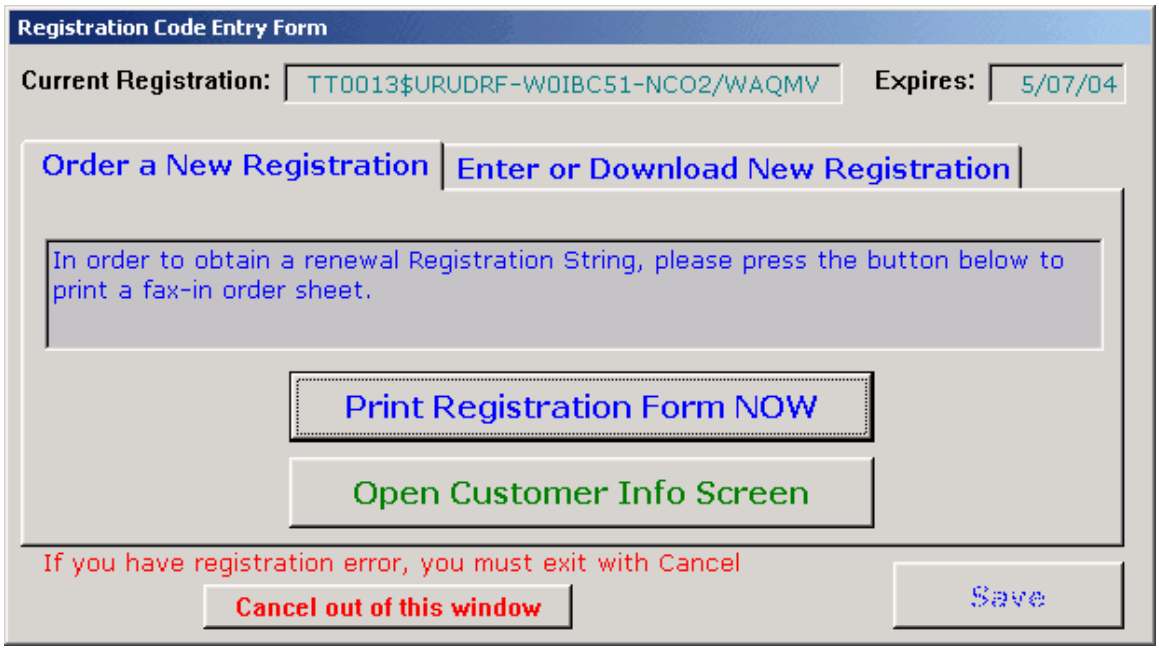
Customer Information Screen:
This is the first screen that you will see after installing Postal Package Partner for the first time. Later, you will be able to access this screen at any time by either going to File/Registration/Customer Information Screen or by going to Help=> Registration=> New Registration and clicking on the "Open Customer Information" Button. The Customer Information Screen is the place where all of your Customer Information is stored. Fields noted with a red asterisk (*) are required fields.



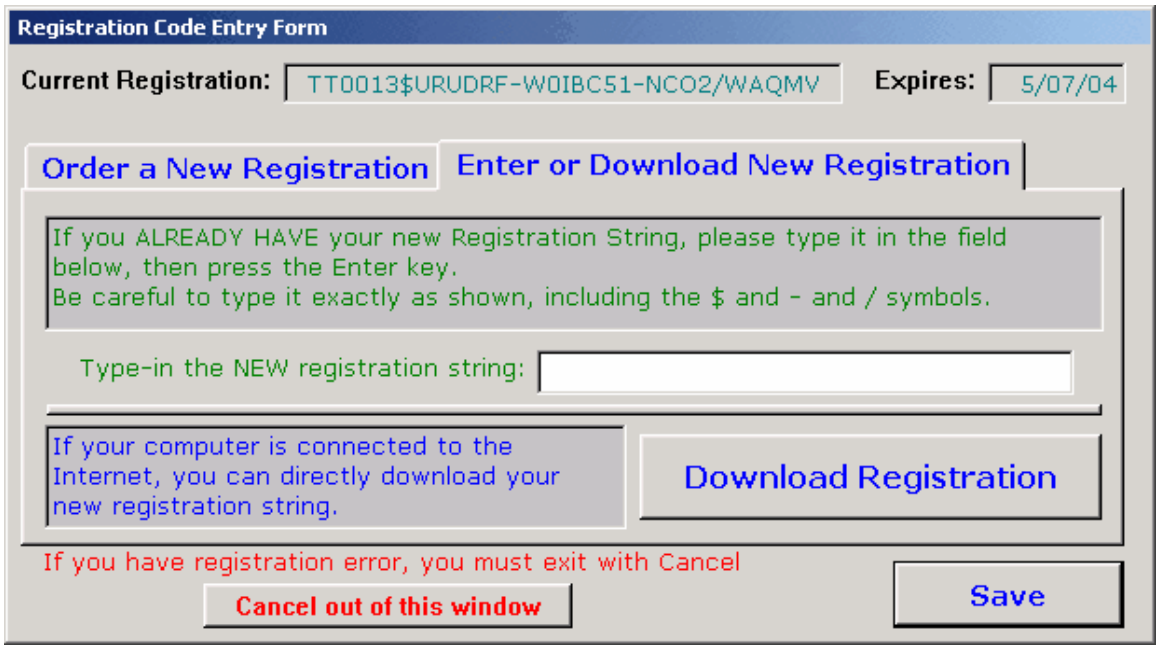
Complete all the fields applicable to your company. The Customer Information Screen allows you to specify different contacts for User and Purchaser, as well as displaying your program version and Expiration information. If you do not currently have a valid Registration Code, you can obtain one by filling out this screen, printing the form using the Print Registration Form Button and then faxing it to Window Book at (617) 354-3961.

Enter or Download a New Registration:
Open the Registration Code Entry Form by going to File/Registration/New Registration. If you don't currently have a valid Registration Code, you will

not need to do this step as you will automatically see the Registration Code Entry Form when launching the Postal Package Partner Program.


Registration Code Entry Form
Current Registration:
TT0013$URUDRF-W0IBC51-NCO2/WAQMV
Expires:
5/07/04
Order a New Registration
Enter or Download New Registration
In order to obtain a renewal Registration String, please press the button below to print a fax-in order sheet.
Print Registration Form NOW
Open Customer Info Screen
If you have registration error, you must exit with Cancel
Cancel out of this window
Save

Click on the "Enter or Download New Registration" Tab. From this tab you can enter your registration string by copying and pasting it from your e-mail or typing it in by hand. You also have the option of downloading your registration with a simple four-digit pin number. If you choose to Download your pin, first connect to the Internet and then click on the "Download Registration" Button.


Registration Code Entry Form
Current Registration:
TT0013$URUDRF-W0IBC51-NCO2/WAQMV
Expires:
5/07/04
Order a New Registration
Enter or Download New Registration
If you ALREADY HAVE your new Registration String, please type it in the field below, then press the Enter key.
Be careful to type it exactly as shown, including the $ and - and / symbols.
Type-in the NEW registration string:
If your computer is connected to the Internet, you can directly download your new registration string.
Download Registration
If you have registration error, you must exit with Cancel
Cancel out of this window
Save

Enter the pin number and click on the "Start The Download" Button. Downloading should only take a few seconds. Once the registration has downloaded successfully, click on the "Save Downloaded Registration" Button.

Some firewalls do not allow the registration string to be downloaded. If you get an "Error 40 - could not connect to server", go back to the "Enter Registration" tab and then type or copy/paste in the full registration string.

Once your registration has been entered, click the "Save" Button. You will see a prompt informing you that your New Registration was accepted and your program will terminate. Simply click on the "OK" Button and restart Postal Package Partner with your new registration.

If you are having trouble entering your registration, temporarily disable any anti-virus software then re-enter the string. If you still get a registration error, contact Window Book tech support at www.windowbook.com/support

Prior to your expiration date, you will see a warning prompt alerting you that your subscription is about to expire. This warning gives you the opportunity to re-register the program before it expires. Once the program passes the expiration date it will not be usable again until you enter a new registration code.

Printer and Scale

Connecting The Printer To Your PC

Unpack the Eltron Printer, connect the power supply and plug into a power outlet. Connect the parallel printer cable, which has been supplied to the back of the printer and to the 25-pin female parallel printer port of your computer. If your computer has only one printer port, you may have to remove the printer cable that is already connected. Load the roll of labels supplied by following the paper loading instructions in the manual. Turn on the printer and press the button on the left side of the cover of the printer. One or more labels will advance until the label gap has been determined.

If your report printer is already connected to your only parallel printer port, you have a number of options:

If your computer is relatively new and running Windows 98, ME or 2000 and are using a recently built report printer, you may be able to use a USB port to connect the report printer to a computer. Check to see if the printer and computer have a USB port. The USB port on the printer is usually a small square connector and a small rectangular connector on the computer. You can purchase an "A to B" USB cable from almost any computer store to connect your USB compatible printer to the computer.

If your computer has a USB port and you are running Windows 98, ME or 2000 but your report printer does not have a parallel port, you can purchase a special USB to Parallel printer cable that will let you connect your non-USB printer to your USB port. This can be purchased at most computer stores but if you have trouble finding it, you can purchase one from Window Book.

You can purchase an IEEE 1284 Compatible Automatic Printer switch (Autohub) that will switch between the two printers automatically using the one printer port you have. DO NOT USE MANUAL PRINTER SWITCHES. They rarely will work with the Eltron Printer and users often forget to change the switch selection, which wastes lots of paper and labels. You will also need a 25 pin to 25 pin IEEE 1284 cable to connect the printer switch to the computer. If you can not find this elsewhere, Window Book can sell you the AutoHub and cable.

You can install an extra parallel port (LPT2:) card so both your printers can be connected to parallel ports. This is inexpensive but you have to install the card in the computer.

If you are on a network, use a network printer to print your reports, statements and manifests.

Installing Your Printer

1. Connecting The Printer To Your PC:

Unpack the Eltron Printer, connect the power supply and plug into a power outlet. Connect the parallel printer cable, which has been supplied to the back of the printer and to the 25-pin female parallel printer port of your computer. If your computer has only one printer port, you may have to remove the printer cable that is already connected. Load the roll of labels supplied by following the paper loading instructions in the manual. Turn on the printer and press the button on the left side of the cover of the printer. One or more labels will advance until the label gap has been determined.

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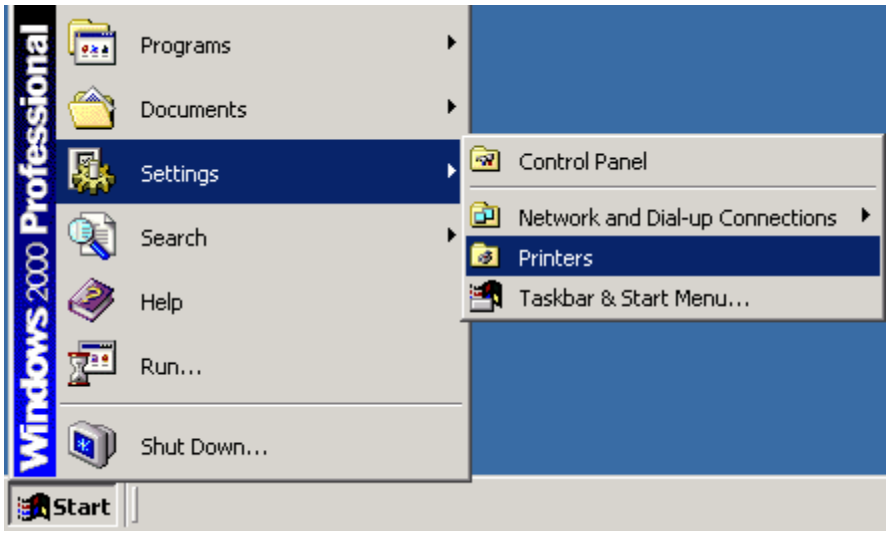
You can install an extra parallel port (LPT2:) card so both your printers can be connected to parallel ports. This is inexpensive but you have to install the card in the computer.

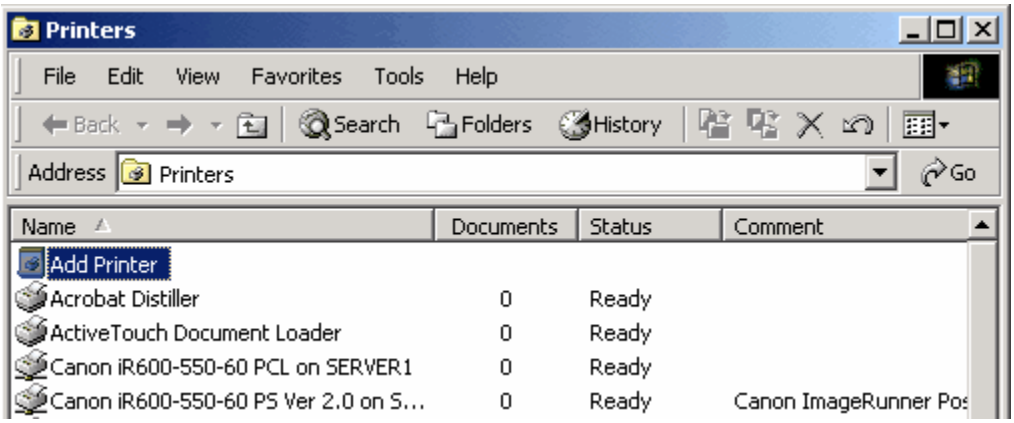
If you are on a network, use a network printer to print your reports, statements and manifests.

2. Installing The Printer Driver:

1. Click **Start** | **Settings** | **Printers**



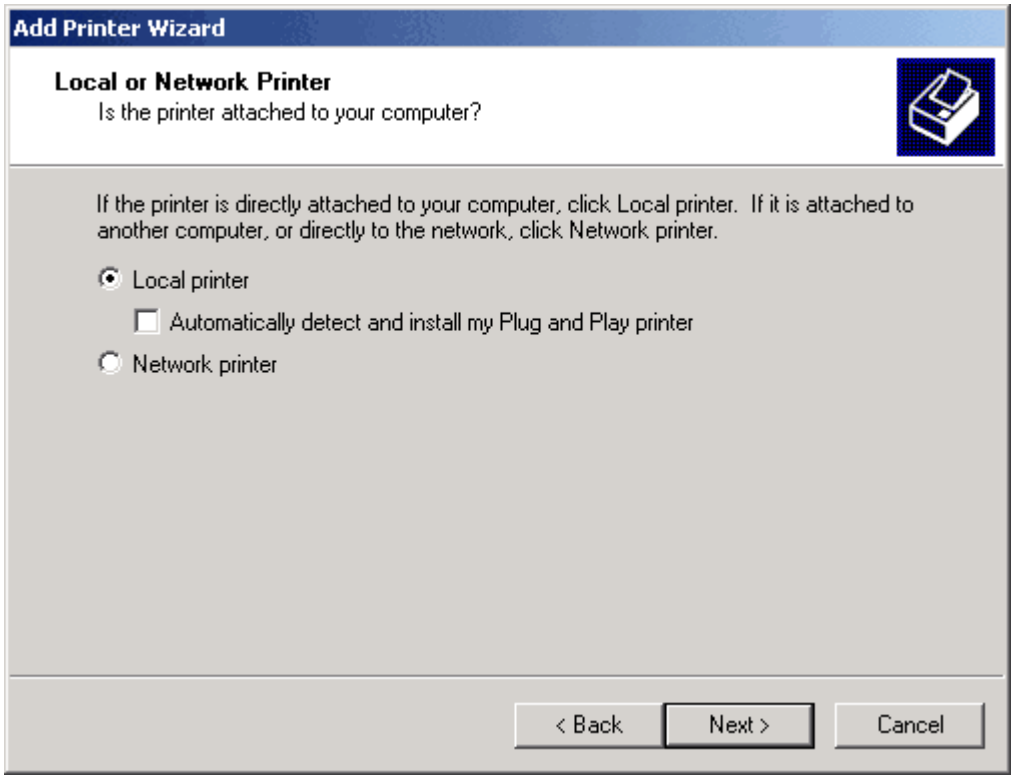
2. Click **Add Printer**


Printers
File Edit View Favorites Tools Help
Back Search Folders History
Address Printers
Go
Name Documents Status Comment
Add Printer
Acrobat Distiller 0 Ready
ActiveTouch Document Loader 0 Ready
Canon iR600-550-60 PCL on SERVER1 0 Ready
Canon iR600-550-60 PS Ver 2.0 on S... 0 Ready Canon ImageRunner Pos

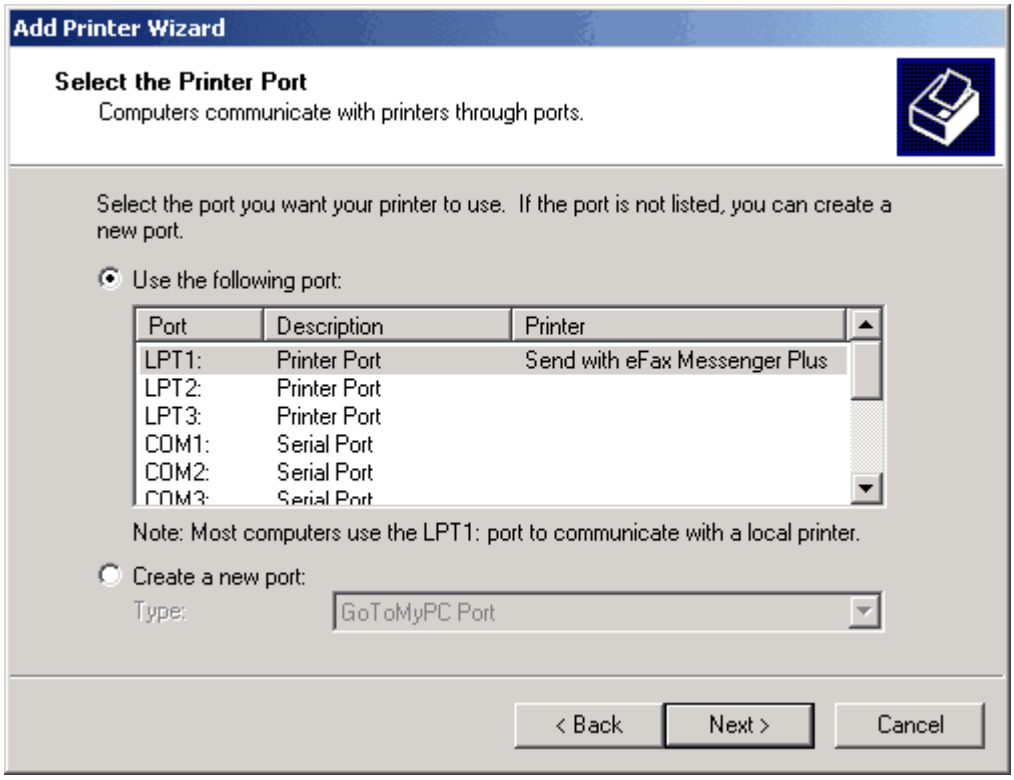
3. Click the **Next** Button

Add Printer Wizard
Welcome to the Add Printer Wizard
This wizard helps you install a printer or make printer connections.
To continue, click Next.
< Back
Next >
Cancel

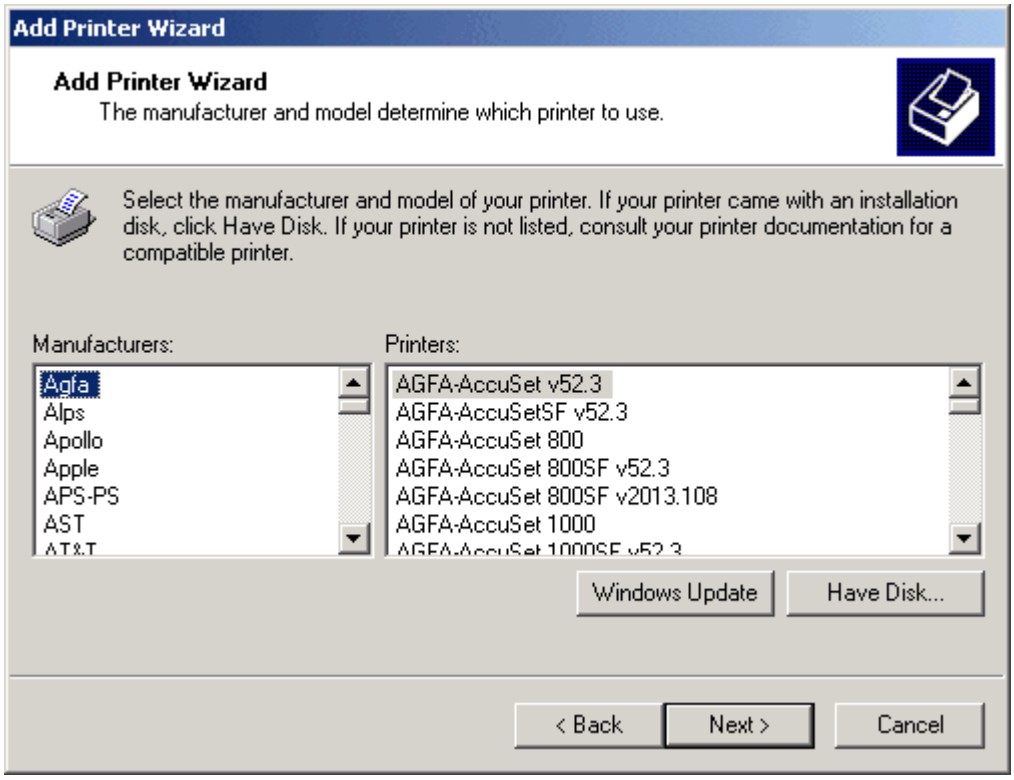
4. Select the **Local Printer** Radio Button and click the **Next** Button


Add Printer Wizard
Local or Network Printer
Is the printer attached to your computer?
If the printer is directly attached to your computer, click Local printer. If it is attached to another computer, or directly to the network, click Network printer.
Local printer
Automatically detect and install my Plug and Play printer
Network printer
< Back
Next >
Cancel

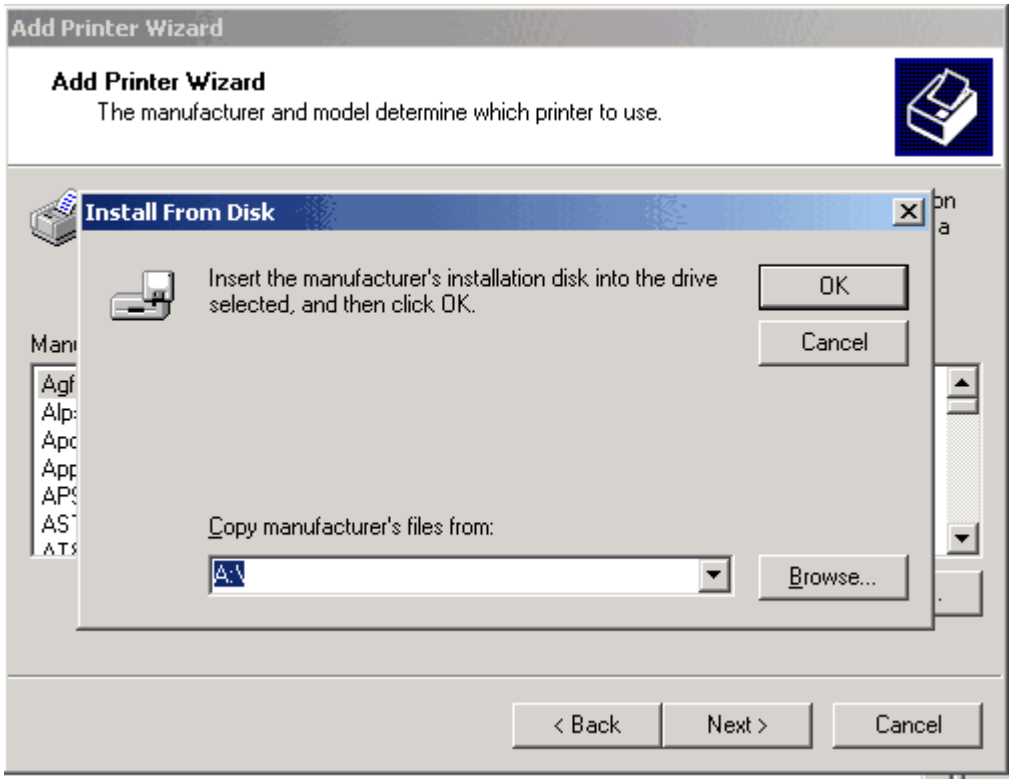
5.Select the **LPT1 Printer Port** and Click the **Next** Button



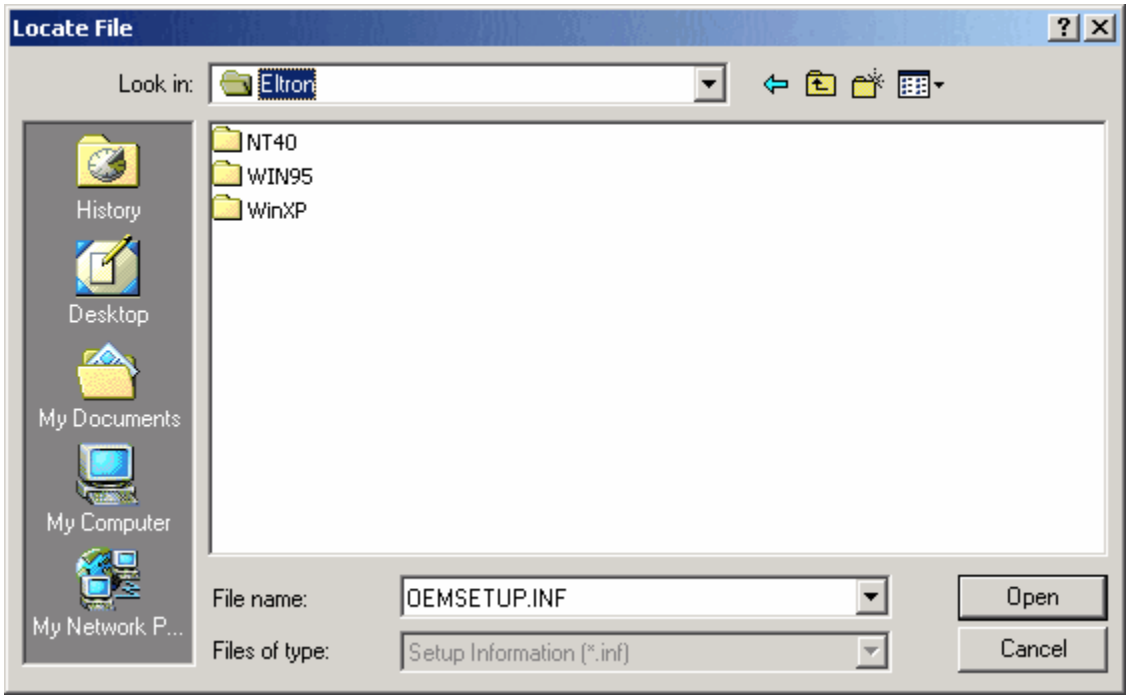
6. Click on the **Have Disk** button



7. Click the **Browse** button

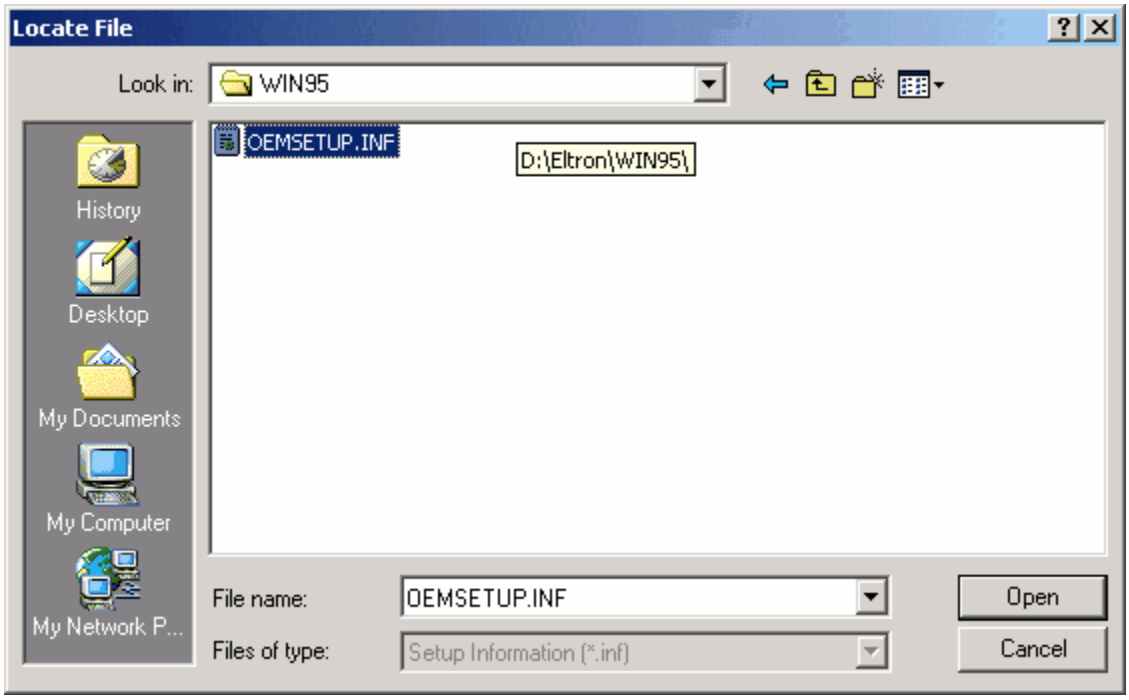


8. Select **CD Drive Letter** and locate **Eltron** folder

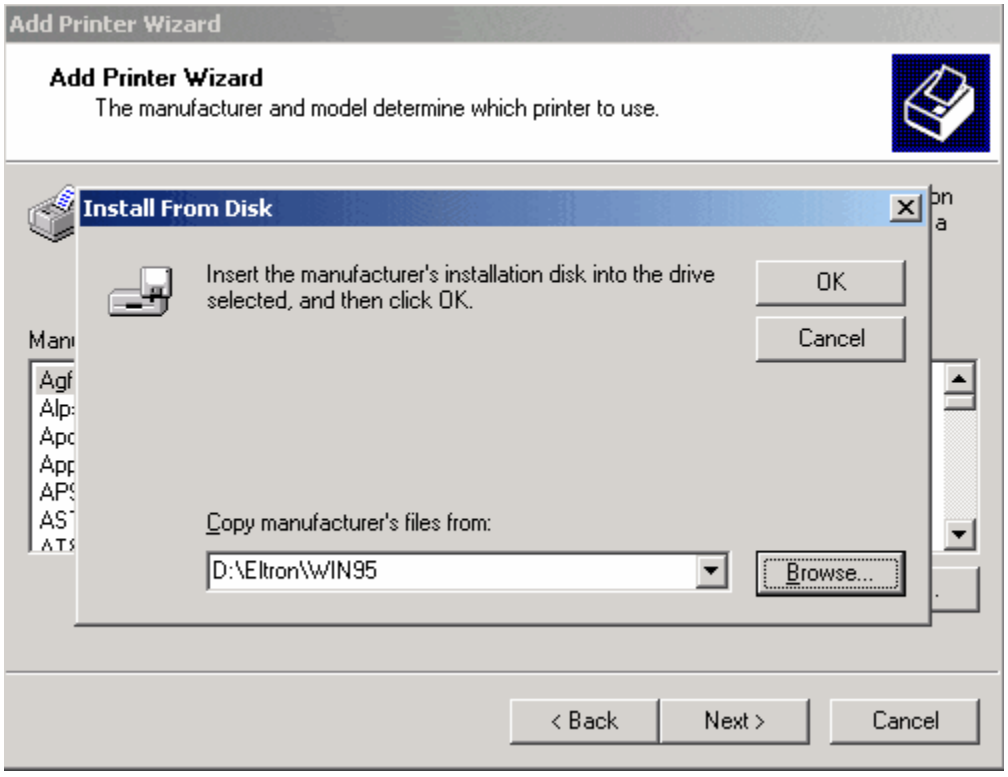


9. Then select **Operating System folder (i.e., win95,win NT)** and Click

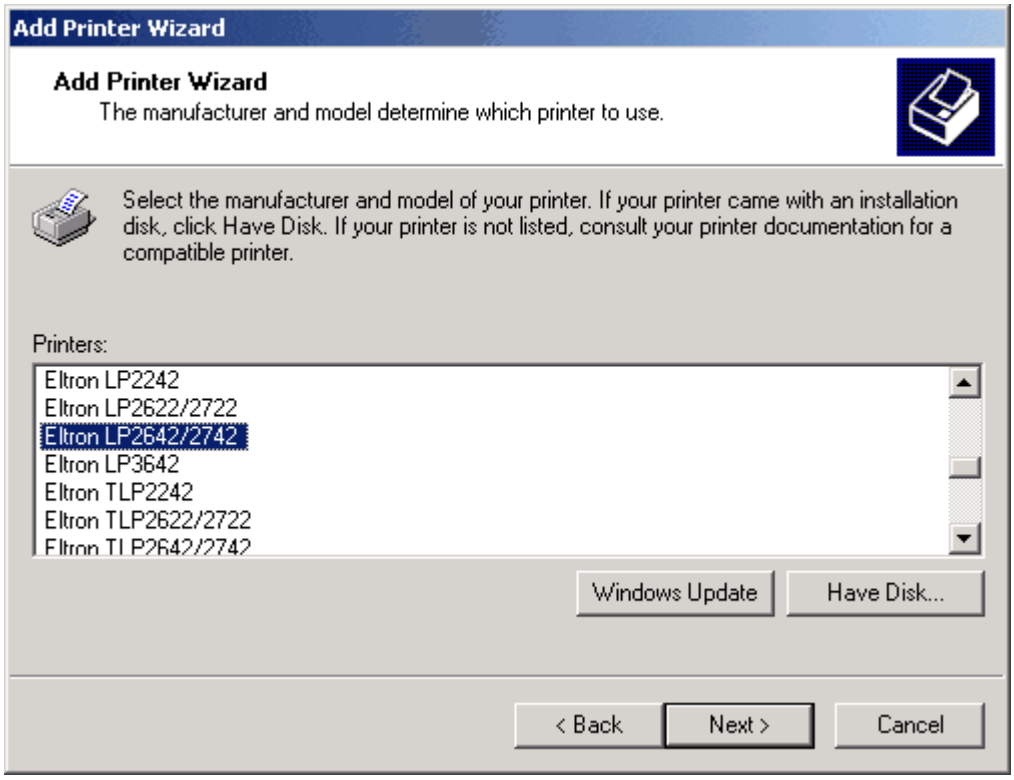
the **Open** Button



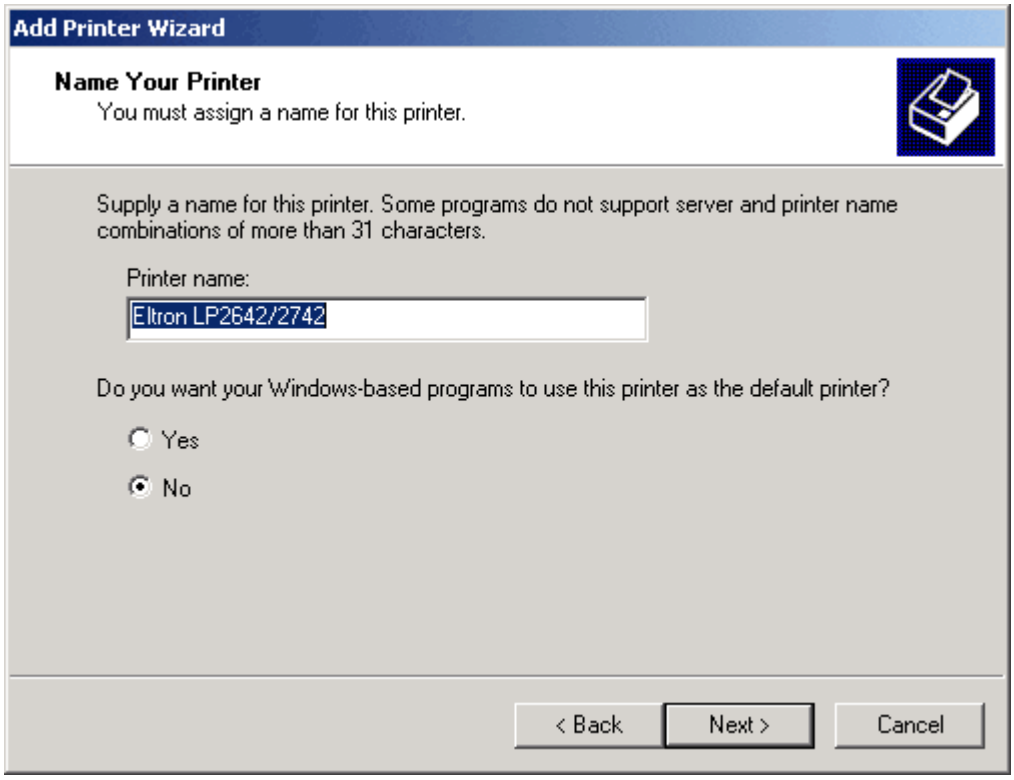
10. Click the **OK** Button once more



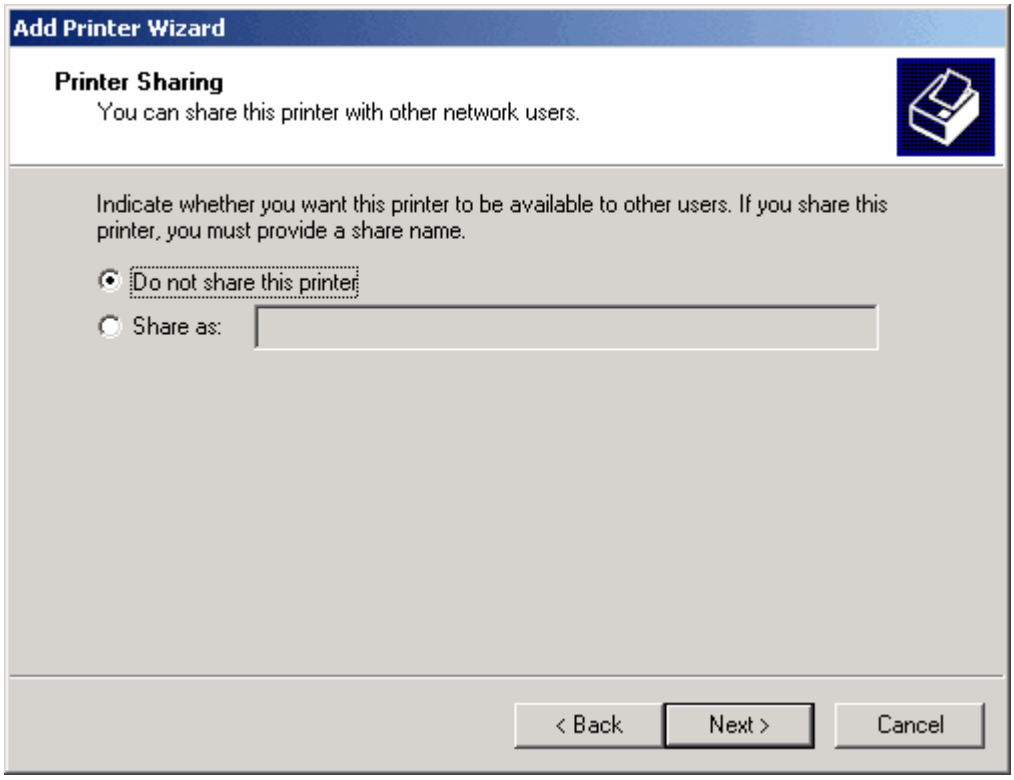
11. Select the **Eltron LP2642/2742** printer from list and click **Next** button


Add Printer Wizard
Add Printer Wizard
The manufacturer and model determine which printer to use.
Select the manufacturer and model of your printer. If your printer came with an installation disk, click Have Disk. If your printer is not listed, consult your printer documentation for a compatible printer.
Printers:
Eltron LP2242
Eltron LP2622/2722
Eltron LP2642/2742
Eltron LP3642
Eltron TLP2242
Eltron TLP2622/2722
Windows Update
Have Disk...
< Back
Next >
Cancel

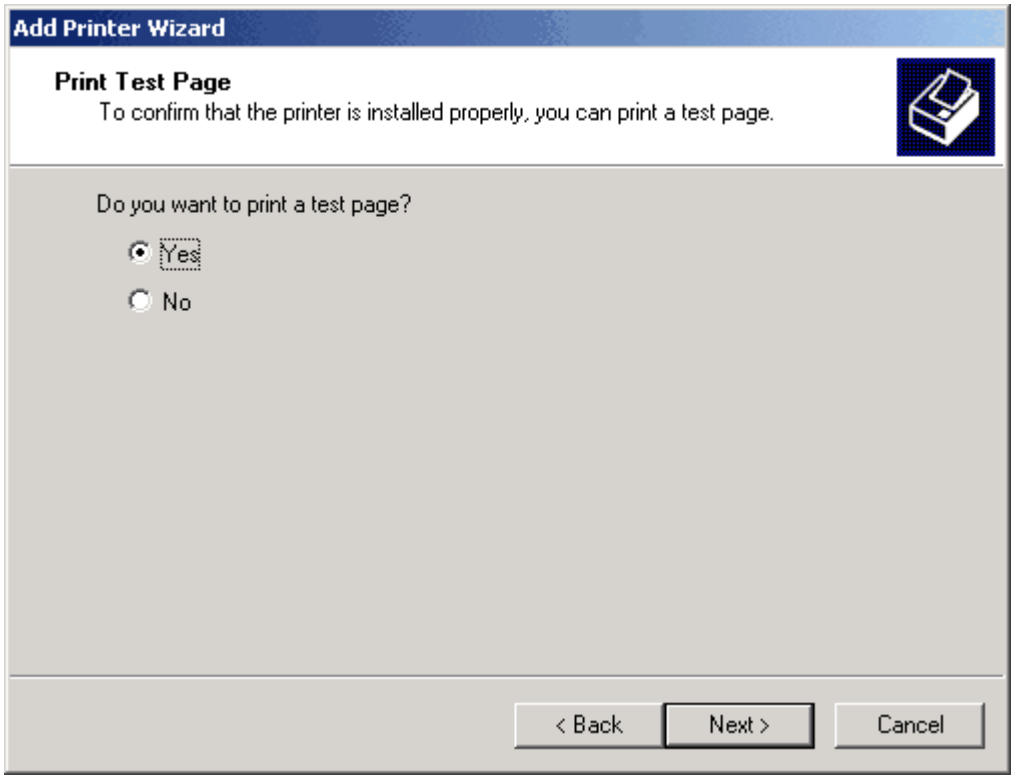
12. Click on **Next** button once more to save printer name


Add Printer Wizard
Name Your Printer
You must assign a name for this printer.
Supply a name for this printer. Some programs do not support server and printer name combinations of more than 31 characters.
Printer name:
Eltron LP2642/2742
Do you want your Windows-based programs to use this printer as the default printer?
Yes
No
< Back
Next >
Cancel

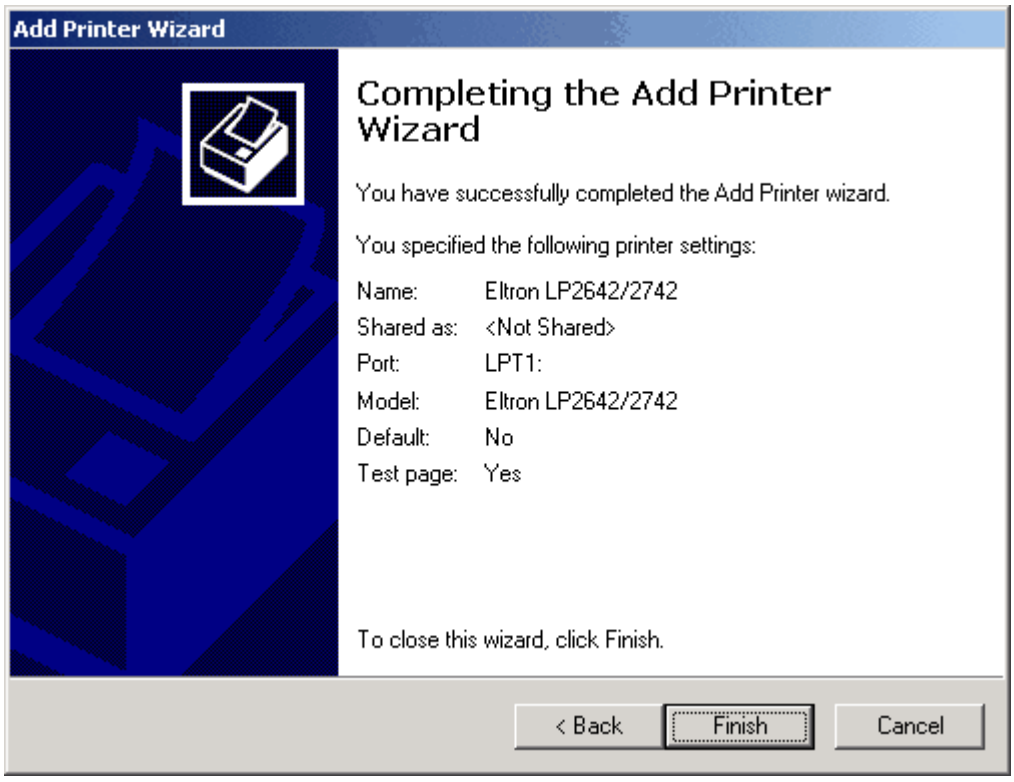
13. Select **Do not share this printer** and click on the **Next** button


Add Printer Wizard
Printer Sharing
You can share this printer with other network users.
Indicate whether you want this printer to be available to other users. If you share this printer, you must provide a share name.
Do not share this printer
Share as:
< Back
Next >
Cancel

14. Click on **Yes** button to print test page and click on **Next** Button


Add Printer Wizard
Print Test Page
To confirm that the printer is installed properly, you can print a test page.
Do you want to print a test page?
Yes
No
< Back
Next >
Cancel

15. Click on the **Finish** button to complete installation



Connecting The Scale To Your PC

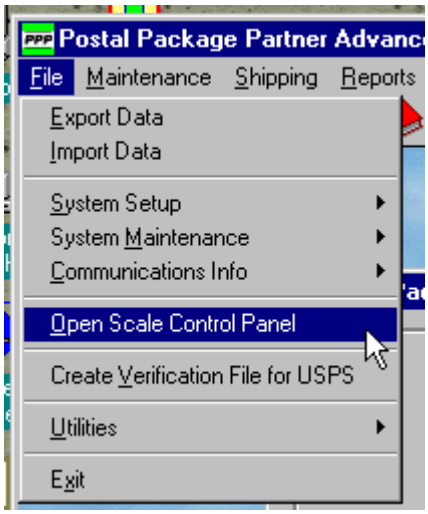
Unpack the scale, place it on a level surface and level it.

You can level the Weigh-Tronix 7623 scale by removing the top and adjusting the feet until the bubble is centered on the level indicator.

Replace the cover and connect the serial cable to the port in the back of the scale and the nine-pin male or twenty-pin male serial port on the back of your computer. Use the adapter supplied if you must plug the cable into an available serial port. If you have a mouse connected to the serial port, you may want to replace the mouse with one capable of using the mini-din bus mouse port on the back of the computer to free up the serial port for the scale.

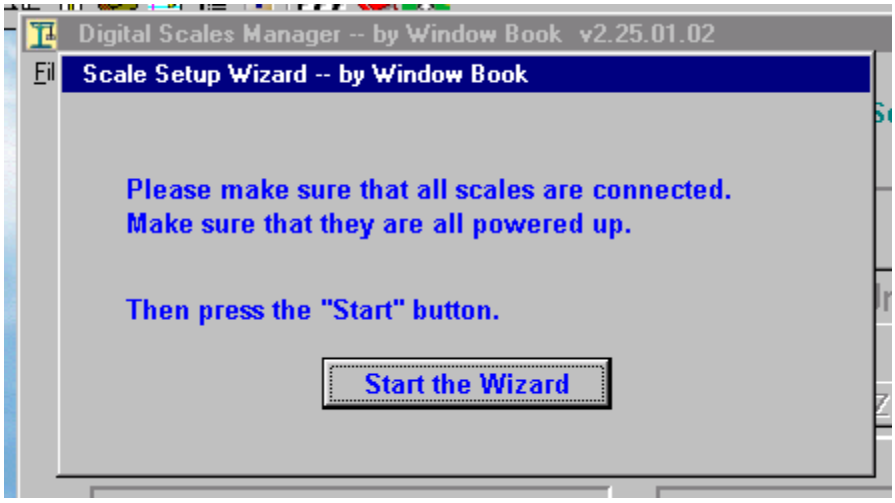
Installing Your Scale

Once the scale is connected to your computer and turned on take the following steps to allow Postal Package Partner to recognize it:
1. Go to "File => Open Scale Control Panel" from the main menu:



2. Highlight and Click the "Open Scale Control Panel" option

3. When the menu comes up click the "Run Scale Setup Wizard" button which will bring you to the following screen:


Digital Scales Manager -- by Window Book v2.25.01.02
Scale Setup Wizard -- by Window Book
Please make sure that all scales are connected.
Make sure that they are all powered up.
Then press the "Start" button.
Start the Wizard

4. Click the "Start the Wizard" button -- the wizard should find the scale.
Note: this may take 2-3 minutes.

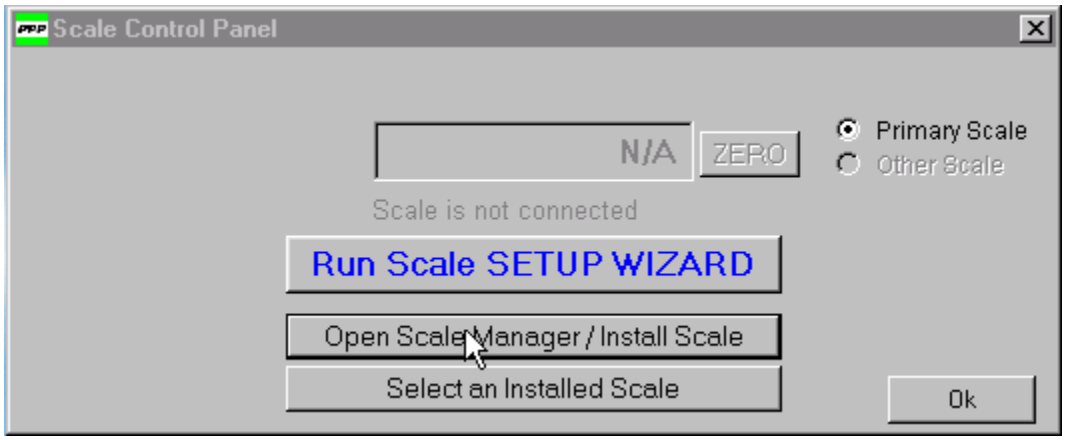
If the wizard does NOT find the scale -- confirm that the scale is plugged in, turned on and connected to a working serial port on the computer. Then

rerun the wizard. Once the program has recognized the scale, you can integrate it by clicking the "Use scale" button on the "Daily Shipping" screen.

5. If the wizard still does not find the scale you can enter an incident in Window Book's online help system (Click "Help => Get Support for PPP => Submit a Question Online" from the main menu), or...

6. To choose the scale manually do the following:

a. Go to "File => Open Scale Control Panel" from the main menu.
b. Click the "Open Scale Manager / Install Scale" button. (see screen shot:)



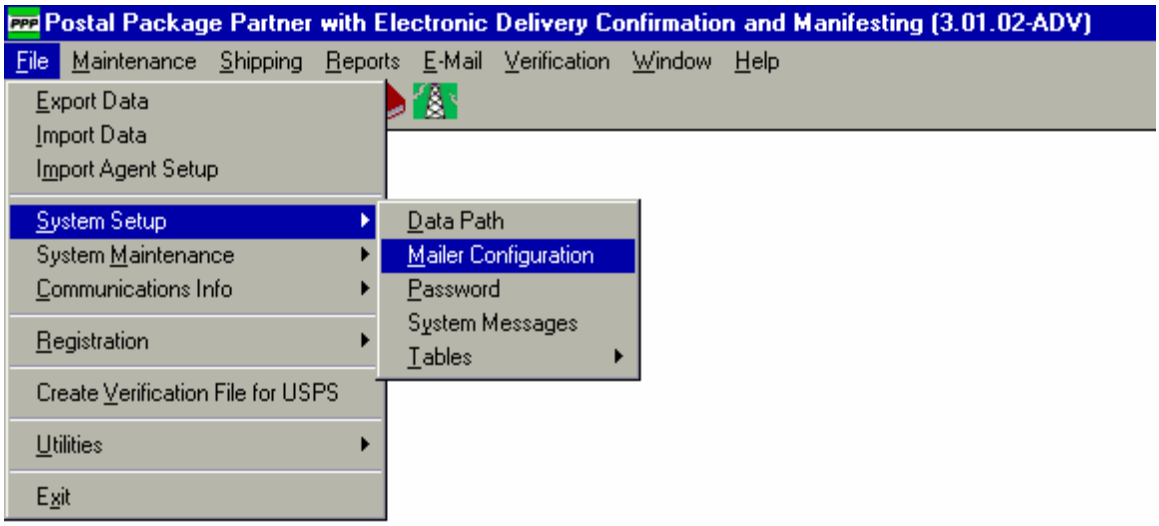
c. Click the "connect" button.
d. Click on the drop down menu for scale types.
e. Choose the scale you are using (for instance "Weightronix 7010" or "Weightronix 7623").
f. Choose the correct Comm port for the scale.
The program will then check that comm port for the scale -- if it doesn't find it the program will give an error message. Be sure to include the error message in any e-mail or online communications with Window Book.
Once the program has recognized the scale, you can integrate it by clicking the "Use scale" button on the "Daily Shipping" screen.

Configuring Postal Package Partner

Mailer Configuration

Mailer Configuration Overview

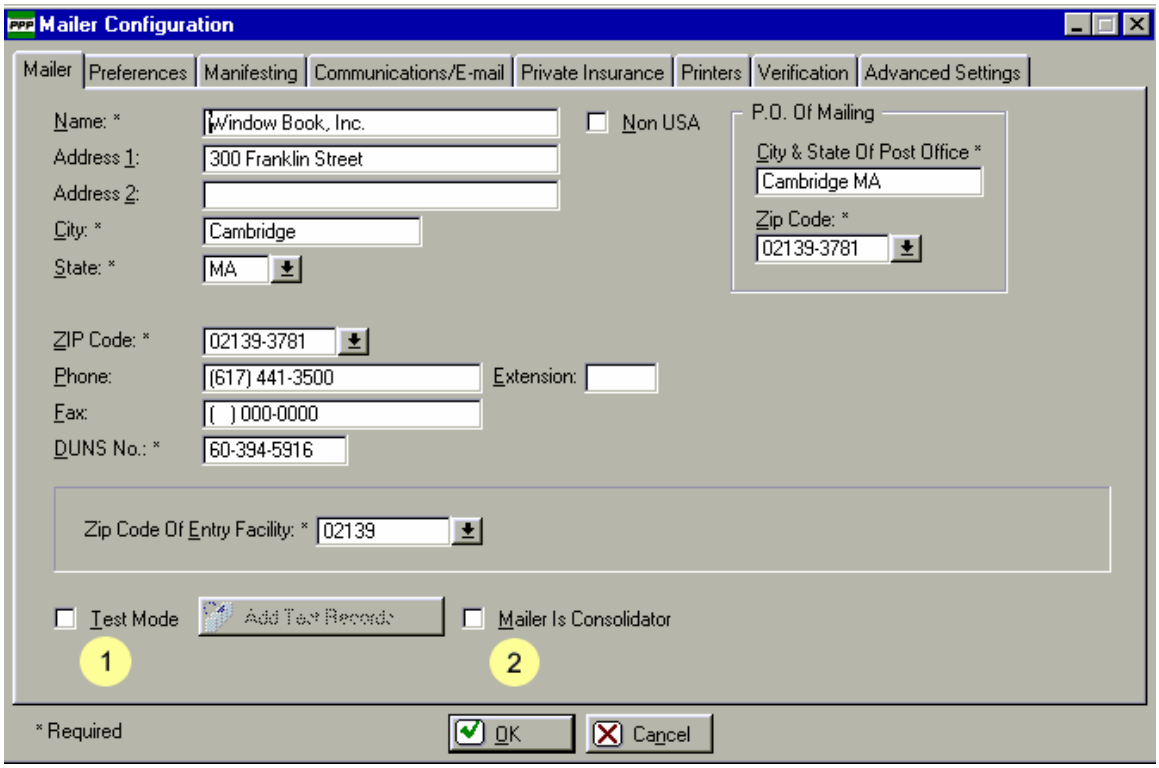
The Mailer Configuration screen you can initialize various settings and customize specific information related to how you would like to use Postal Package Partner. To access the Mailer Configuration screen go to File => System Setup => Mailer Configuration.



Mailer Tab

The first tab in the Mailer Configuration screen allows you to enter in details related to your organization. Many of the fields are required and most of the fields do not need explanation. Here are a few items to consider: The "Test Mode" check box should only be checked when you are initially setting up the program.

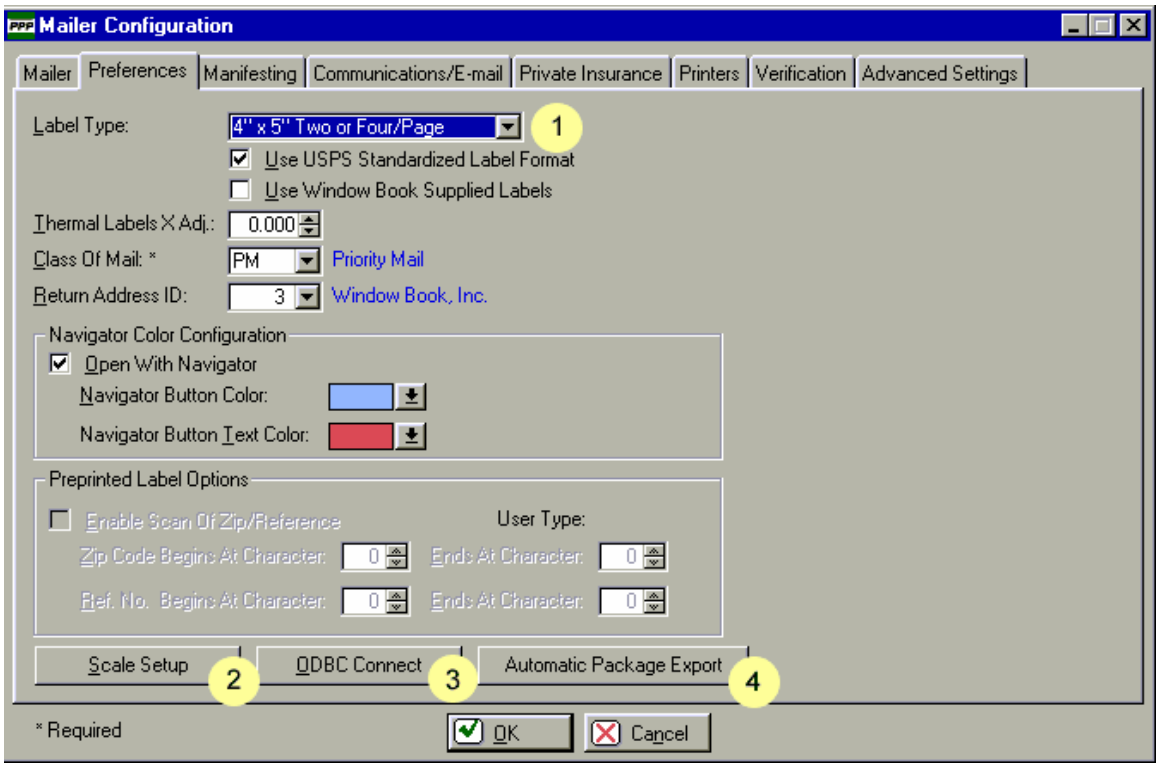
See Printing Test Labels and Communicating Test Records to USPS for details. The "Mailer is a Consolidator" check box should only be checked if you are in the business of distributing mail, such as Parcel Direct or R.R. Donnelley. Contact Window Book for details.



Preferences Tab

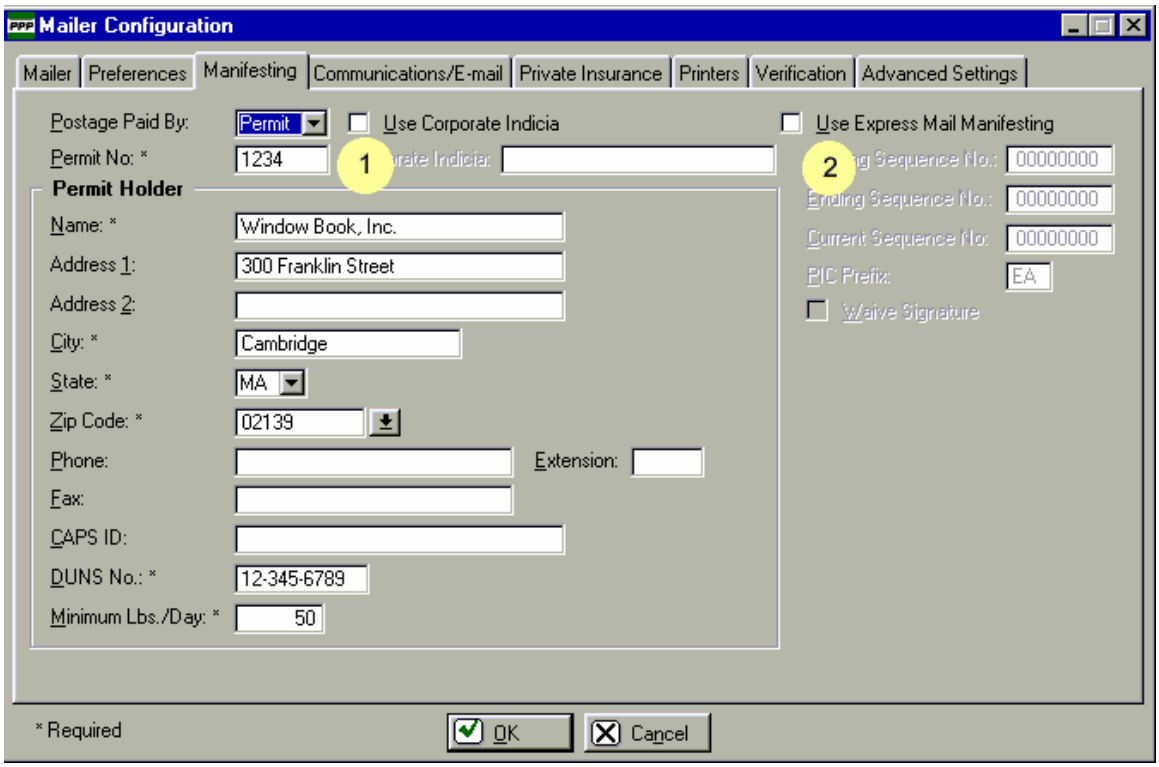
The second tab in the Mailer Configuration screen allows you to enter in details related to your shipping preferences. Many of the fields can be left in their default position. The few items to consider changing are as follows: Use the drop down list next to "Label Type" to select the type of labels you are using The Scale Setup button is explained in the Installing Your Scale section

The ODBC Connect button is explained in the ODBC Connect section The Automatic Package Export button is explained in the Automatic Package Export section



Manifesting Tab

The third tab in the Mailer Configuration screen allows you to enter in details related to your manifesting permit with your local post office. Many of the fields can be left in their default position. The few items to consider changing are as follows: Select "Permit" from the drop down list if you have applied for and have been issued a permit number. The completion of this form is detailed in the Completing USPS Application Forms section. Enter the Permit Number and all of the required Permit Holder information. Express Mail Manifesting requires the completion of a special application and is explained in the Completing USPS Application Forms section.



Communications/E-Mail Tab

The fourth tab in the Mailer Configuration screen allows you to enter in details related to electronic communications and e-mail to your customers. Many of the fields can be left in their default position.

The few items to consider changing are as follows: The User ID and Password are necessary to transmit your electronic file to the USPS Web server. You obtain this Logon ID and password by completing a Request for Computer Access (Form 1357-S) in the Completing USPS Application Forms section.

"Communicate via" should be left on "FTP" unless otherwise instructed by a Window Book representative.

The E-mail Notification Setup section should be completed only if you plan to send e-mail notifications to your customers informing them of the status of their shipments.

Obtain the SMTP Server information from your network administrator or your Internet Service Provider (ISP)

E-mail address is the Return Address on the e-mail that gets distributed

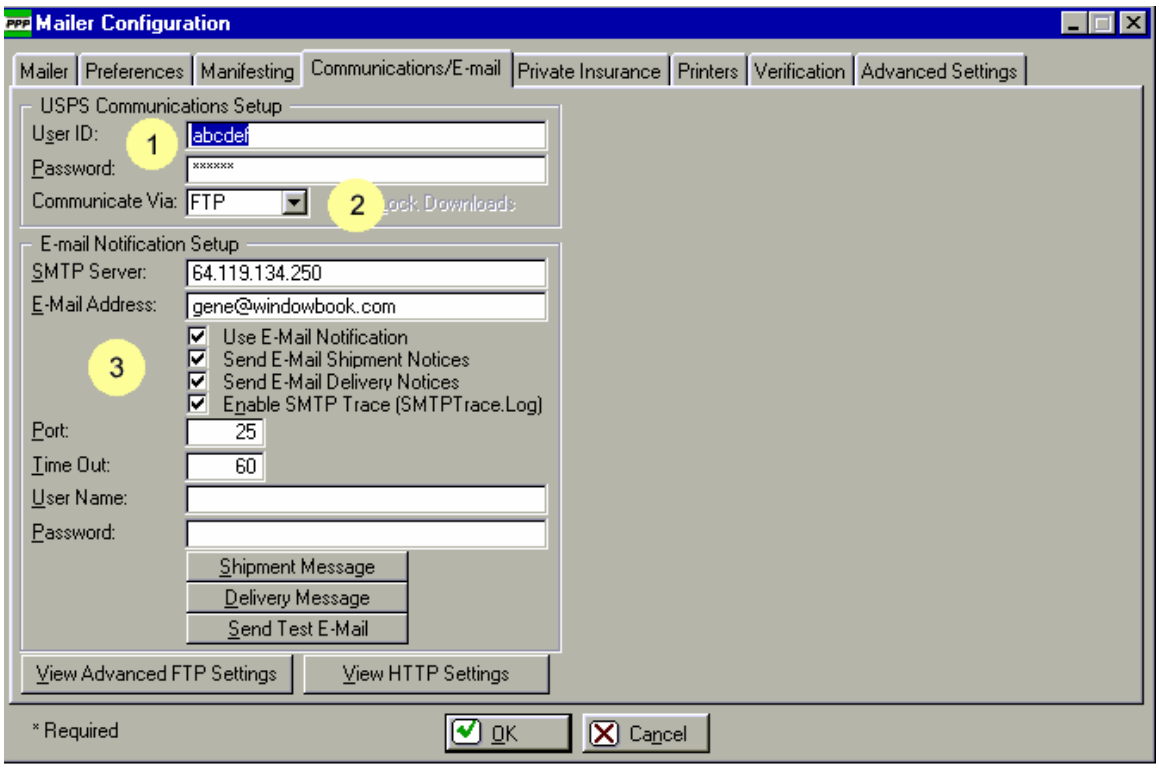
Check off Use E-Mail Notification Check off "Send E-Mail Shipment Notices" and/or "Send E-Mail Delivery Notices" if you want e-mails to go out at the time of shipments and the time of delivery.

Check off "Enable SMTP Trace" which will create a log on your computer of e-mail communications to customers which will help diagnose communications problems should they occur.

User Name and Password are usually not required; check with your Network Administrator

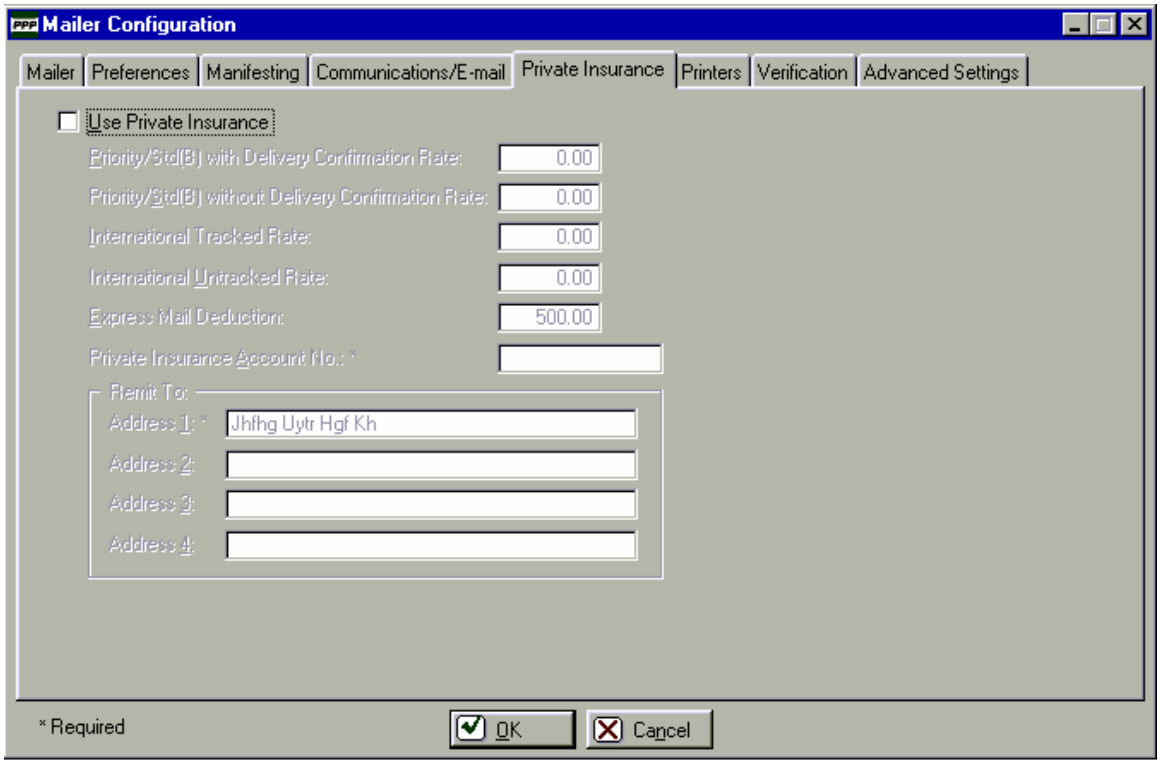
Click the Shipment Message and Delivery Message buttons to view and edit the message you are sending to your customers

Click the Send Test E-mail button to test your e-mail connection and view the messages being sent to your customers.


Mailer Configuration
Mailer
Preferences
Manifesting
Communications/E-mail
Private Insurance
Printers
Verification
Advanced Settings
USPS Communications Setup
User ID:
abcdef
Password:
******
Communicate Via:
FTP
1
2
Lock Downloads
E-mail Notification Setup
SMTP Server:
64.119.134.250
E-Mail Address:
gene@windowbook.com
3
Use E-Mail Notification
Send E-Mail Shipment Notices
Send E-Mail Delivery Notices
Enable SMTP Trace (SMTPTrace.Log)
Port:
25
Time Out:
60
User Name:
Password:
Shipment Message
Delivery Message
Send Test E-Mail
View Advanced FTP Settings
View HTTP Settings
* Required
OK
Cancel

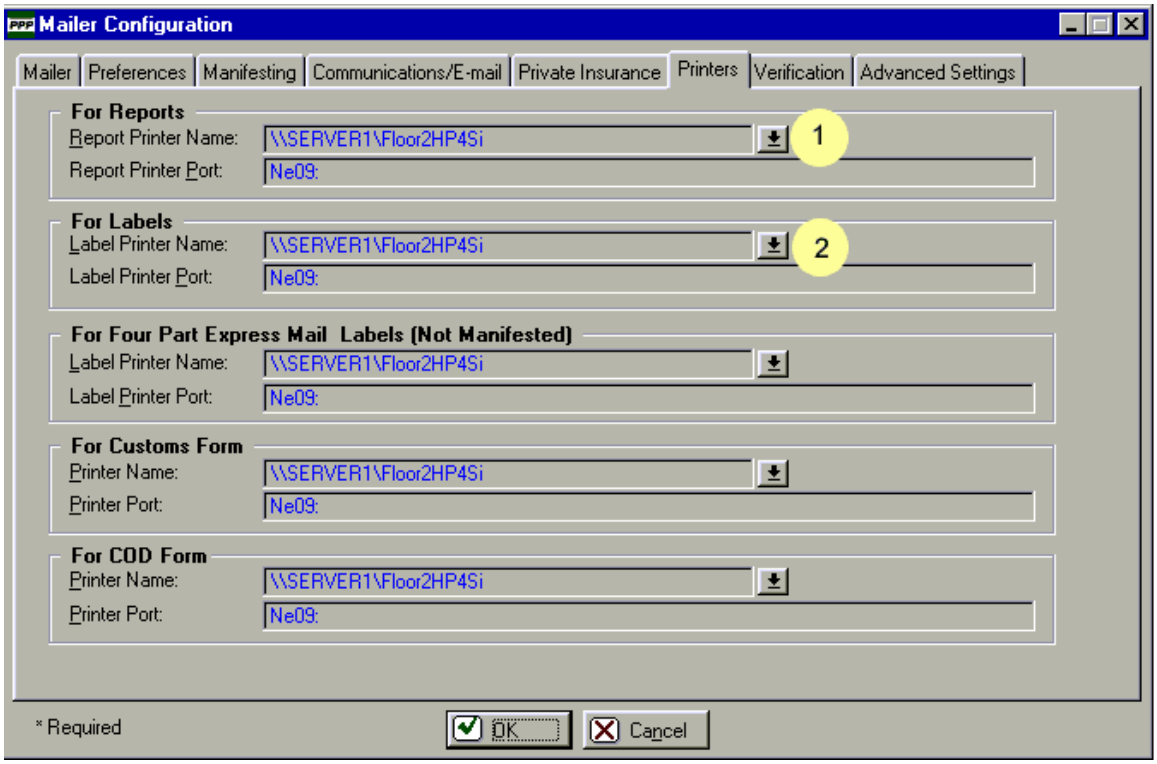
Private Insurance Tab

The fifth tab in the Mailer Configuration screen allows you to enter in details related to private insurance. If you do not chose to obtain private insurance then you can leave this screen as it is. If you would like more information about obtaining private insurance contact your Window Book sales representative at (800) 370-2410.



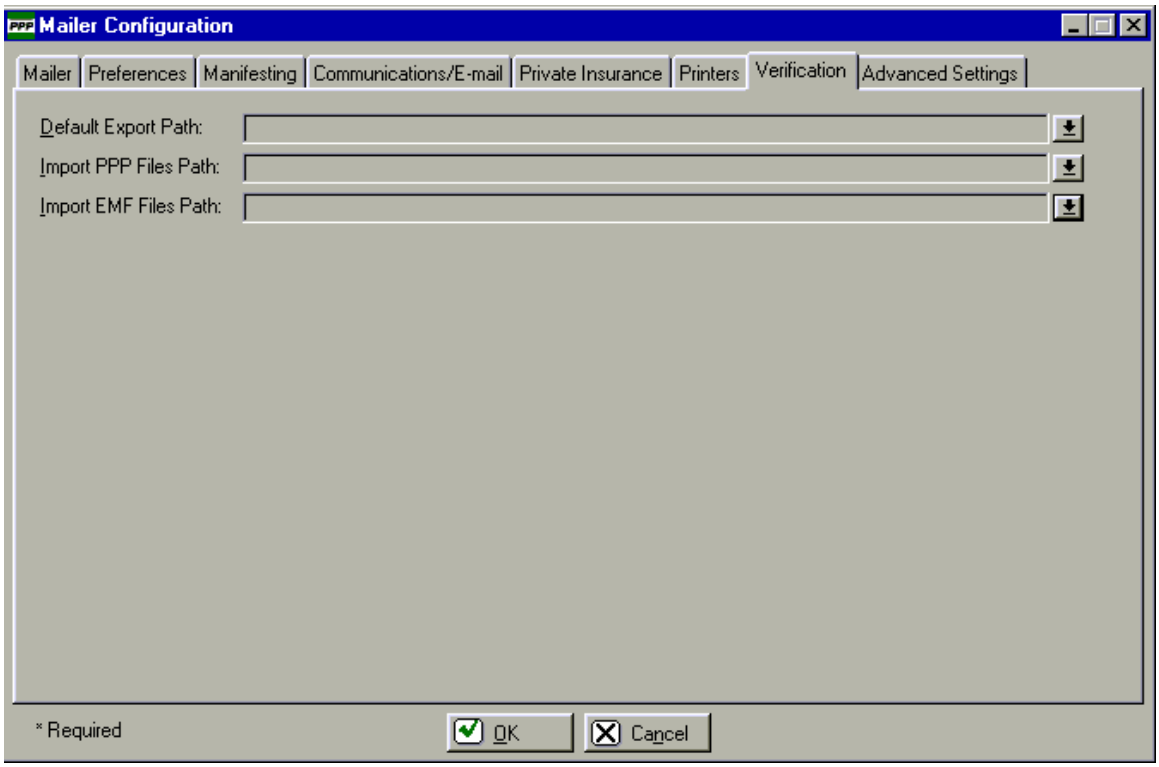
Printers Tab

The sixth tab in the Mailer Configuration screen allows you to enter in details related to printing Reports and Labels. In most cases these are the only two printers that need to be set up. Click the dropdown arrow next to the For reports textbox to access the device you want to print your reports on. Click the dropdown arrow next to the For Labels textbox to access the device you want to print your labels on. If the device is not listed then it probably needs to be installed. For instructions on how to do this access the Installing Your Printer section.



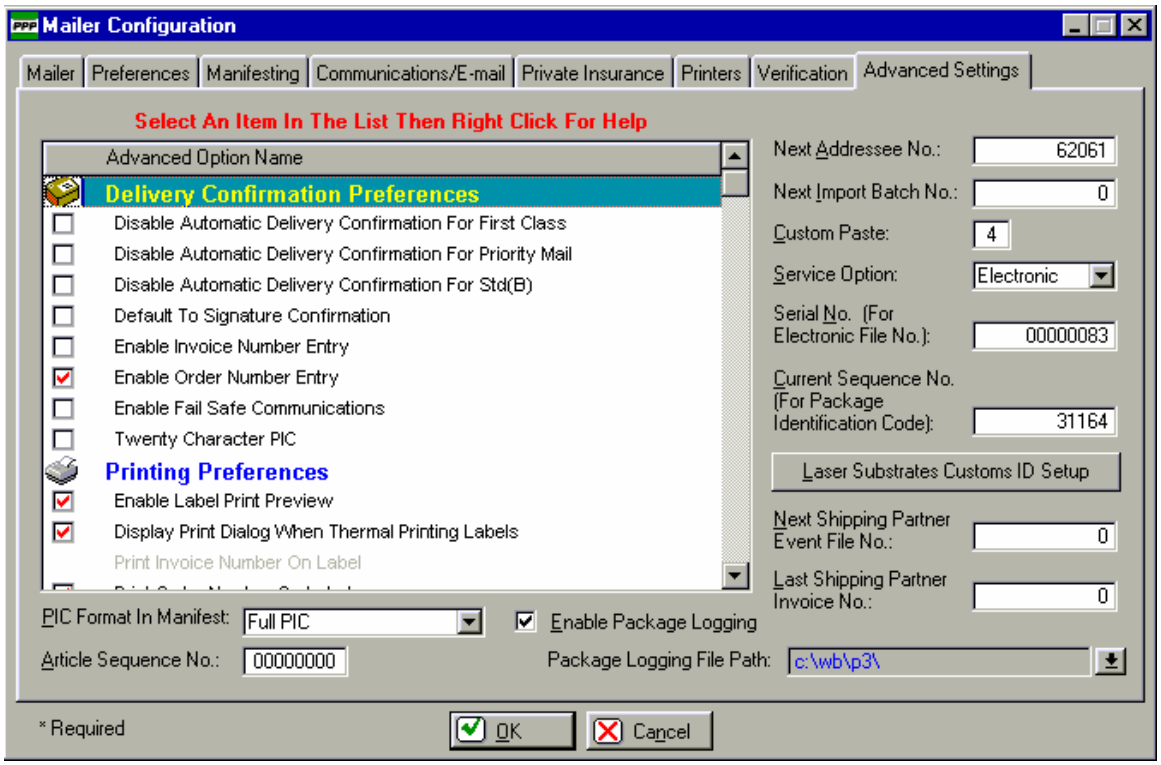
Verification Tab

The seventh tab in the Mailer Configuration screen allows you to enter in details related to Post Office Verification. If you are manifesting, representatives from the US Postal Service may do periodic visits and sample the parcels you are mailing to ensure you are accurately weighing and processing your parcels. If you are using Postal Package Partner for the first time, you don't need to identify any files paths at this time.



Advanced Settings Tab

The eighth tab in the Mailer Configuration screen allows you to taylor the program in many ways. The main window to be concerned about is entitled Advanced Option Name and is on the left side of the screen. To learn about each option simply left click one time on that option to highlight it; then right click to pop up a What's This? window; then left click to viewed an explanation of the option you have highlighted.



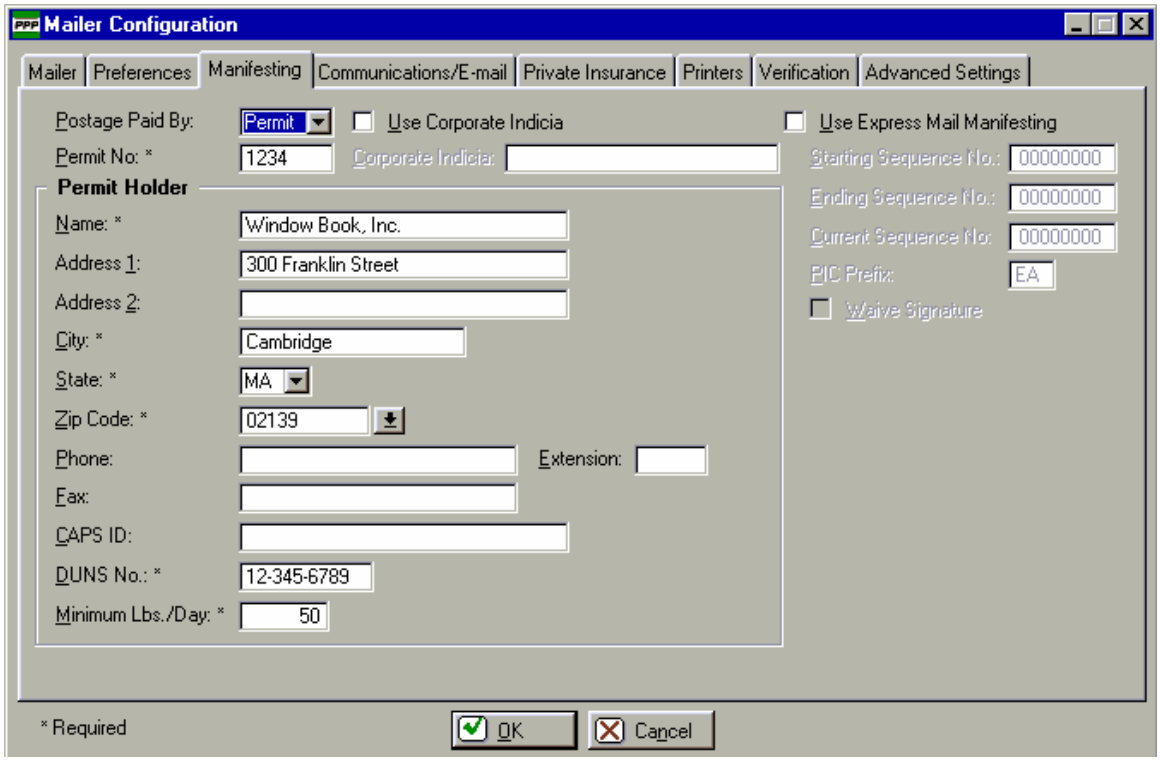
Printing Test Labels & Communicating Test Records to USPS

Printing Test Labels & Communicating Test Records

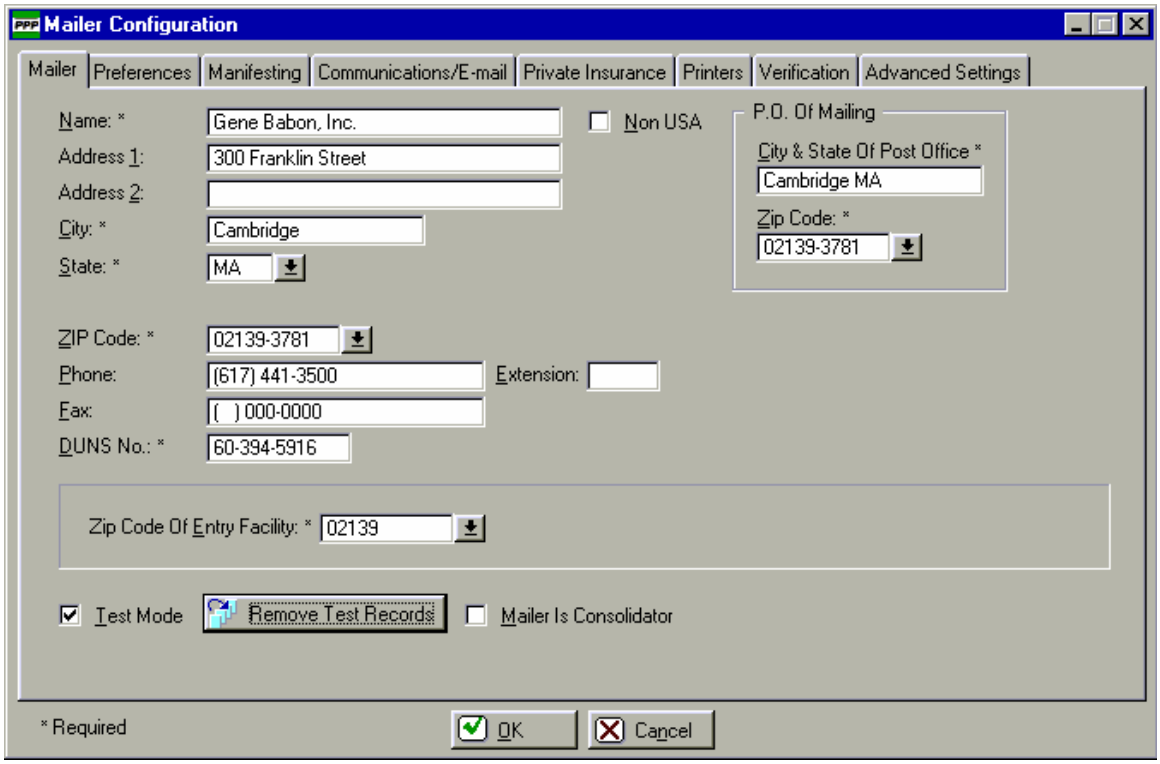
Printing Test Labels

Open Postal Package Partner and go to File => System Setup => Mailer Configuration.

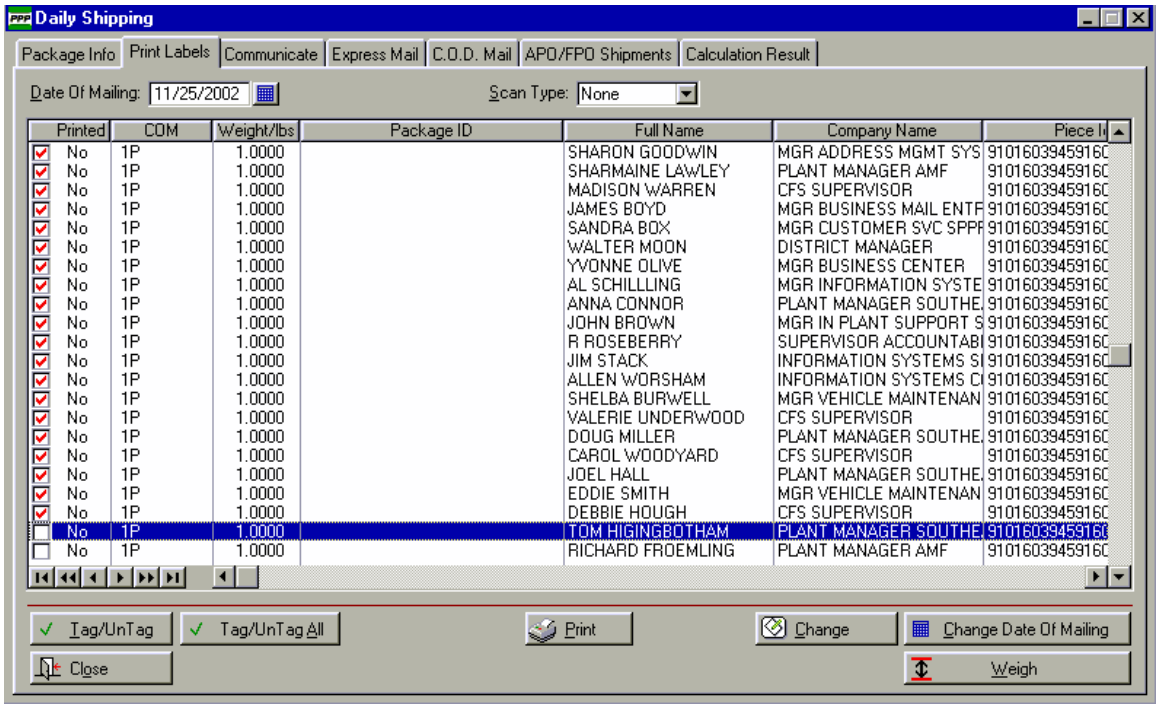
Go to the Manifesting tab, select Permit, and fill in your Permit Holder information.



Go to the Mailer tab and place a check in the "Test Mode" check box. Also, click the "Add Test Records" button. You have successfully added test records when the button changes to "Remove Test Records." DO NOT click on "Remove Test Records."

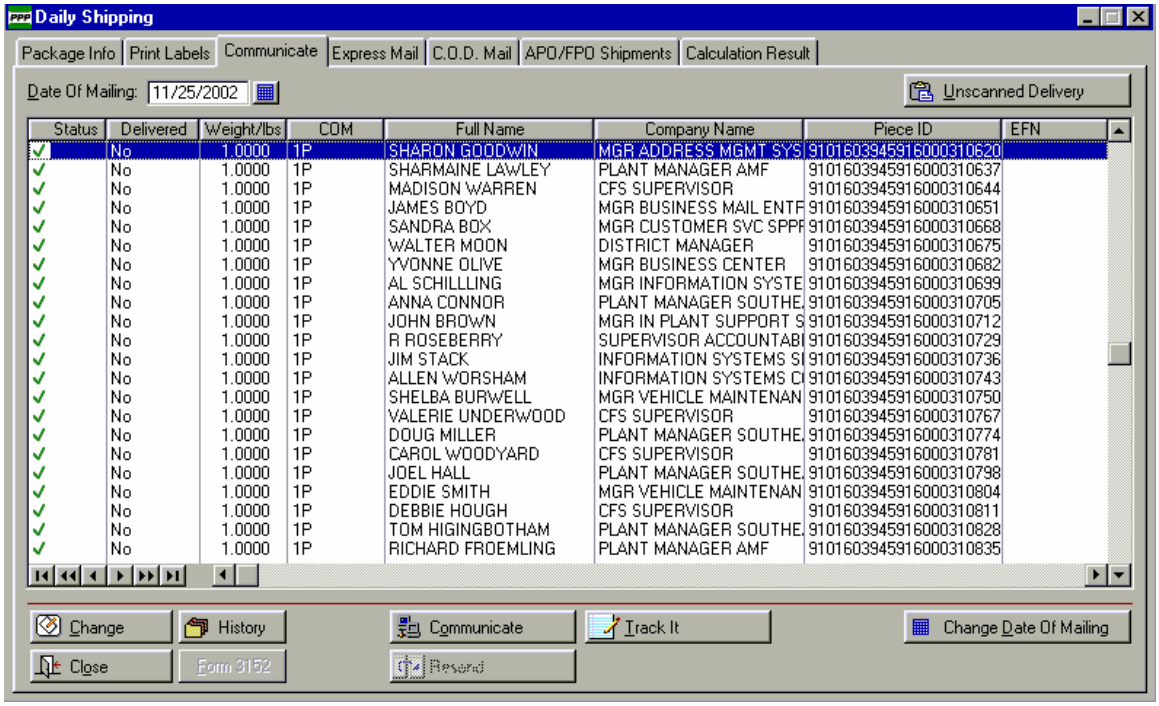


Click "OK" Go to Daily Shipping => Print Labels. Click on the "Tag/Untag All" button. Now click the "tag" button so that the first 20 records show a red check mark to their left and that no other records are checked.


Daily Shipping
Package Info
Print Labels
Communicate
Express Mail
C.O.D. Mail
APO/FPO Shipments
Calculation Result
Date Of Mailing: 11/25/2002
Scan Type: None
Printed
COM
Weight/lbs
Package ID
Full Name
Company Name
Piece I
No 1P 1.0000 SHARON GOODWIN MGR ADDRESS MGMT SYS 91016039459160
No 1P 1.0000 SHARMAINE LAWLEY PLANT MANAGER AMF 91016039459160
No 1P 1.0000 MADISON WARREN CFS SUPERVISOR 91016039459160
No 1P 1.0000 JAMES BOYD MGR BUSINESS MAIL ENTF 91016039459160
No 1P 1.0000 SANDRA BOX MGR CUSTOMER SVC SPPF 91016039459160
No 1P 1.0000 WALTER MOON DISTRICT MANAGER 91016039459160
No 1P 1.0000 YVONNE OLIVE MGR BUSINESS CENTER 91016039459160
No 1P 1.0000 AL SCHILLLING MGR INFORMATION SYSTE 91016039459160
No 1P 1.0000 ANNA CONNOR PLANT MANAGER SOUTHE 91016039459160
No 1P 1.0000 JOHN BROWN MGR IN PLANT SUPPORT S 91016039459160
No 1P 1.0000 R ROSEBERRY SUPERVISOR ACCOUNTABI 91016039459160
No 1P 1.0000 JIM STACK INFORMATION SYSTEMS SI 91016039459160
No 1P 1.0000 ALLEN WORSHAM INFORMATION SYSTEMS CI 91016039459160
No 1P 1.0000 SHELBA BURWELL MGR VEHICLE MAINTENAN 91016039459160
No 1P 1.0000 VALERIE UNDERWOOD CFS SUPERVISOR 91016039459160
No 1P 1.0000 DOUG MILLER PLANT MANAGER SOUTHE 91016039459160
No 1P 1.0000 CAROL WOODYARD CFS SUPERVISOR 91016039459160
No 1P 1.0000 JOEL HALL PLANT MANAGER SOUTHE 91016039459160
No 1P 1.0000 EDDIE SMITH MGR VEHICLE MAINTENAN 91016039459160
No 1P 1.0000 DEBBIE HOUGH CFS SUPERVISOR 91016039459160
No 1P 1.0000 TOM HIGINGBOTHAM PLANT MANAGER SOUTHE 91016039459160
No 1P 1.0000 RICHARD FROEMLING PLANT MANAGER AMF 91016039459160
Tag/UnTag
Tag/UnTag All
Print
Change
Change Date Of Mailing
Close
Weigh

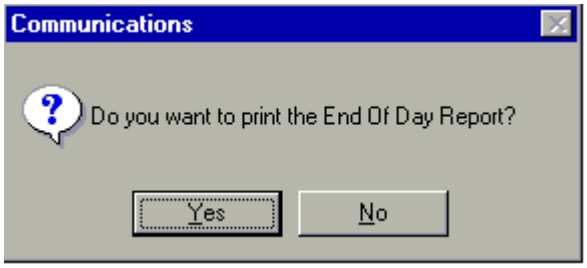
Click the "Print" button at the bottom center of the Print Labels screen to print the 20 selected records.

Communicating Test Records to the USPS Web Site: Make sure your computer is connected to the Internet. After you have printed your labels, go to the Communicate screen in Daily Shipping



Status	Delivered	Weight/lbs	COM	Full Name	Company Name	Piece ID	EFN
☑	No	1.0000	1P	SHARON GOODWIN	MGR ADDRESS MGMT SYS	9101603945916000310620	
✓	No	1.0000	1P	SHARMAINE LAWLEY	PLANT MANAGER AMF	9101603945916000310637	
✓	No	1.0000	1P	MADISON WARREN	CFS SUPERVISOR	9101603945916000310644	
✓	No	1.0000	1P	JAMES BOYD	MGR BUSINESS MAIL ENTF	9101603945916000310651	
✓	No	1.0000	1P	SANDRA BOX	MGR CUSTOMER SVC SPPF	9101603945916000310668	
✓	No	1.0000	1P	WALTER MOON	DISTRICT MANAGER	9101603945916000310675	
✓	No	1.0000	1P	YVONNE OLIVE	MGR BUSINESS CENTER	9101603945916000310682	
✓	No	1.0000	1P	AL SCHILLLING	MGR INFORMATION SYSTE	9101603945916000310699	
✓	No	1.0000	1P	ANNA CONNOR	PLANT MANAGER SOUTHE	9101603945916000310705	
✓	No	1.0000	1P	JOHN BROWN	MGR IN PLANT SUPPORT S	9101603945916000310712	
✓	No	1.0000	1P	R ROSEBERRY	SUPERVISOR ACCOUNTABI	9101603945916000310729	
✓	No	1.0000	1P	JIM STACK	INFORMATION SYSTEMS SI	9101603945916000310736	
✓	No	1.0000	1P	ALLEN WORSHAM	INFORMATION SYSTEMS CI	9101603945916000310743	
✓	No	1.0000	1P	SHELBA BURWELL	MGR VEHICLE MAINTENAN	9101603945916000310750	
✓	No	1.0000	1P	VALERIE UNDERWOOD	CFS SUPERVISOR	9101603945916000310767	
✓	No	1.0000	1P	DOUG MILLER	PLANT MANAGER SOUTHE	9101603945916000310774	
✓	No	1.0000	1P	CAROL WOODYARD	CFS SUPERVISOR	9101603945916000310781	
✓	No	1.0000	1P	JOEL HALL	PLANT MANAGER SOUTHE	9101603945916000310798	
✓	No	1.0000	1P	EDDIE SMITH	MGR VEHICLE MAINTENAN	9101603945916000310804	
✓	No	1.0000	1P	DEBBIE HOUGH	CFS SUPERVISOR	9101603945916000310811	
✓	No	1.0000	1P	TOM HIGINGBOTHAM	PLANT MANAGER SOUTHE	9101603945916000310828	
✓	No	1.0000	1P	RICHARD FROEMLING	PLANT MANAGER AMF	9101603945916000310835	

Click the "Communicate" button at the bottom center of the screen. You will be prompted to print an end of Day Report, which you should do. Save this report for your records.



Please check your End of Day Report to make sure that the records listed match the printed labels. If correct, you may click "Yes" in answer to the question, "Is your End of Day Report correct?" Monitor the screen while your records upload to the USPS site. You will be prompted to print a 3152 Form (unless you are using the Gold system), which includes an electronic file number (EFN) and the matching bar code for your shipment.

United States Postal Service

Delivery Confirmation Certification

Printed: 11/25/2002 16:47

Company Information

Company Name	Address (Number, street, suite no., city, state, and ZIP Code)
Gene Babon, Inc.	300 Franklin Street Cambridge, MA 02139-3781
DUNS® Number 60-394-5916	

Electronic File

The electronic file submitted by the company shown above has been certified by the National Customer Support Center (NCSC) to be complete and accurate in both content and transmisson and to meet the requirements as defined in Publication 91 *Delivery Confirmation Technical Guide*

Authorized NCSC Signature	Date Signed
ON FILE	**ON FILE**

Barcoded Labels

The barcoded labels printed and submitted by the company shown above have been certified by the National Customer Support Center (NCSC) to meet the standards and specifications as prescribed in Publication 91 *Delivery Confirmation Technical Guide* and the appropriate ANSI or AIM published standards.

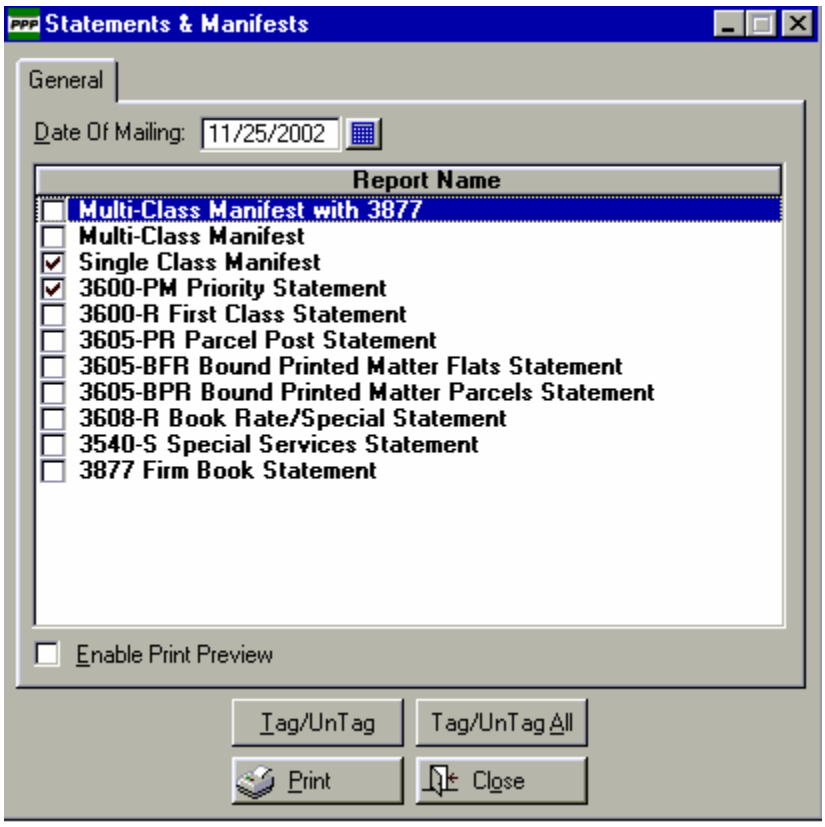
Authorized NCSC Signature	Date Signed
ON FILE	**ON FILE**

Keep the original of this form in a safe place. Make a photocopy for each mailing and place a label printed with a barcode representing the Delivery Confirmation Electronic File Number from the electronic file for this SPECIFIC MAILING below. If you cannot print a barcoded label, fill in the serial number and check digit (the last nine characters) of your Delivery Confirmation Electronic File Number (positions 17-25 in the header record) for this SPECIFIC MAILING in the space indicated.

Place the barcoded label here, OR write the Serial Number and Check Digit of the electronic file in the spaces provided:
Delivery Confirmation Electronic File Number:

9150603945916000000831

Click "Yes," and then, if you have other classes of mail, go to Reports > Statements and Manifests and print the reports that are already checked off.

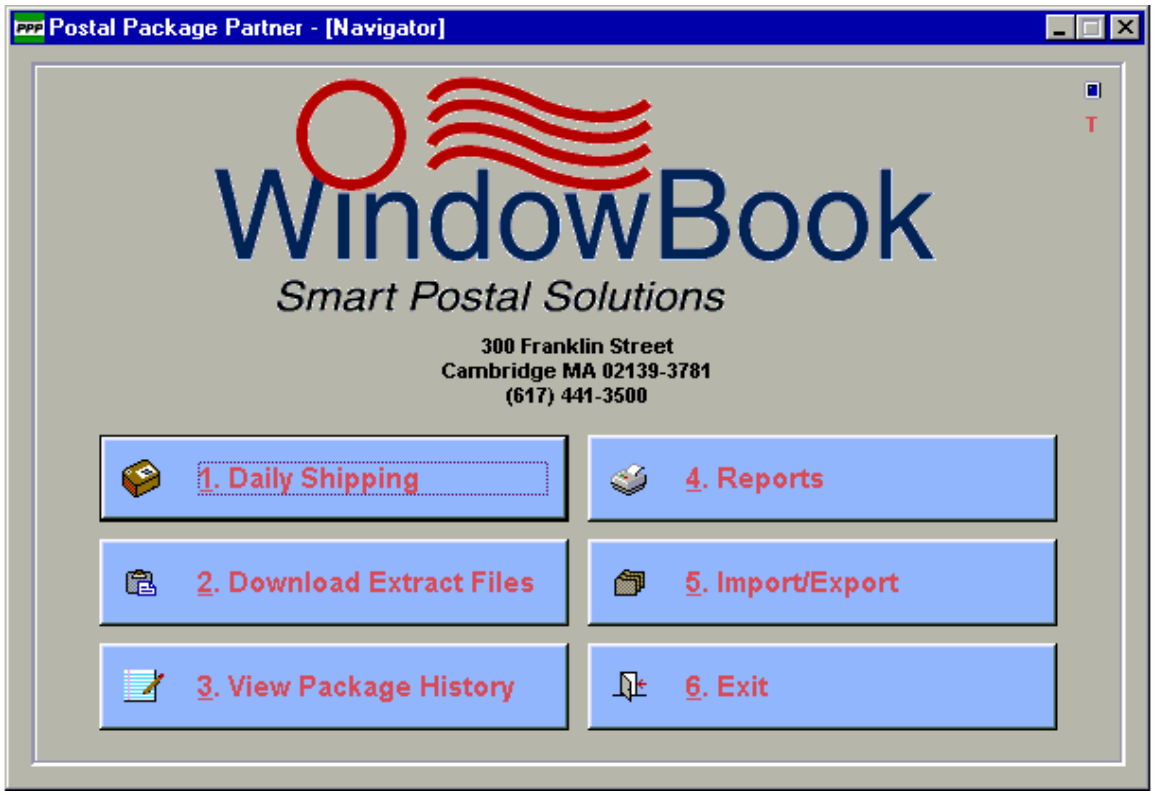

Statements & Manifests
General
Date Of Mailing: 11/25/2002
Report Name
Multi-Class Manifest with 3877
Multi-Class Manifest
Single Class Manifest
3600-PM Priority Statement
3600-R First Class Statement
3605-PR Parcel Post Statement
3605-BFR Bound Printed Matter Flats Statement
3605-BPR Bound Printed Matter Parcels Statement
3608-R Book Rate/Special Statement
3540-S Special Services Statement
3877 Firm Book Statement
Enable Print Preview
Tag/UnTag
Tag/UnTag All
Print
Close

Using Postal Package Partner

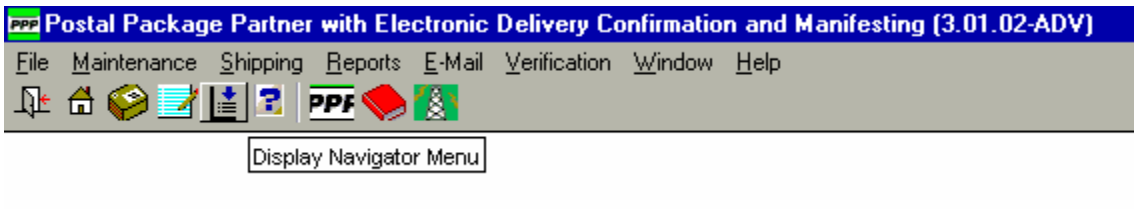
The Navigator Screen (Main Menu)

The Navigator Screen Overview

The Navigator screen is the "home page" within Postal Package Partner. From the Navigator screen you can access the five main areas of the software program as follows:



The Navigator window should appear in the middle of your screen when you first open your program. If the Navigator screen is not visible, then click the Display Navigator Menu button (the fifth icon from the left) at the top of your screen to make it visible.


Postal Package Partner with Electronic Delivery Confirmation and Manifesting (3.01.02-ADV)
File Maintenance Shipping Reports E-Mail Verification Window Help
Display Navigator Menu

Daily Shipping

Ways of Shipping a Package

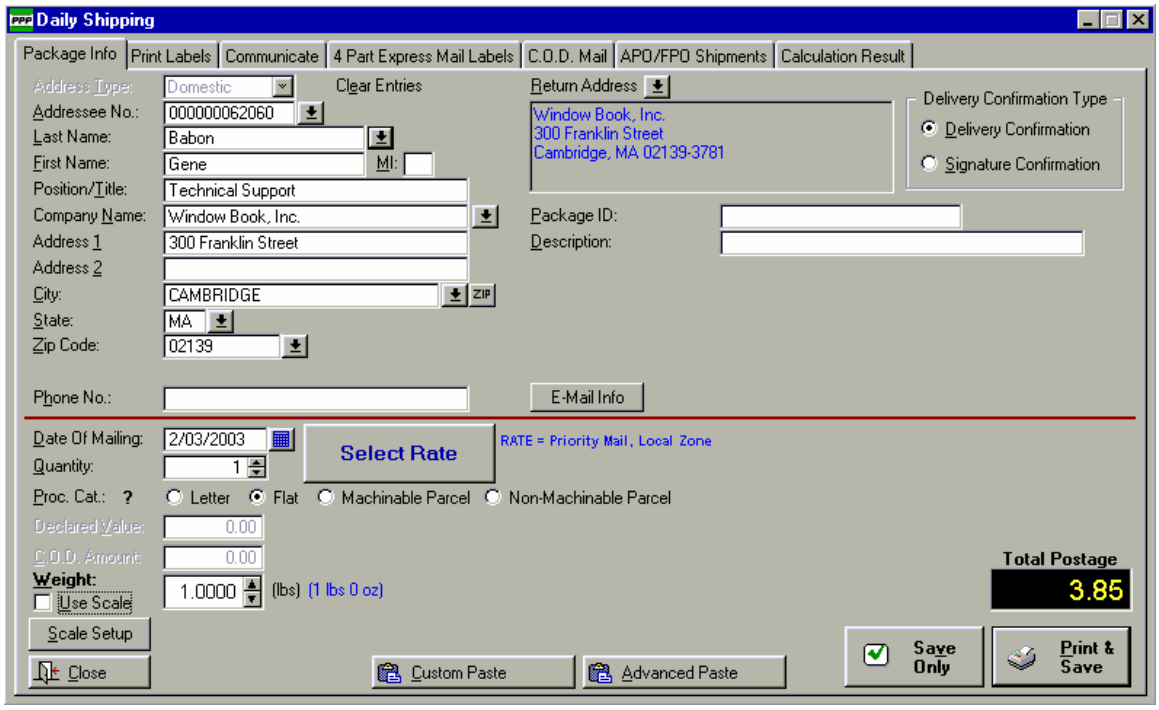
Ways of Shipping A Package Overview

You have two ways to prepare a package for shipment, either Manual or Import.

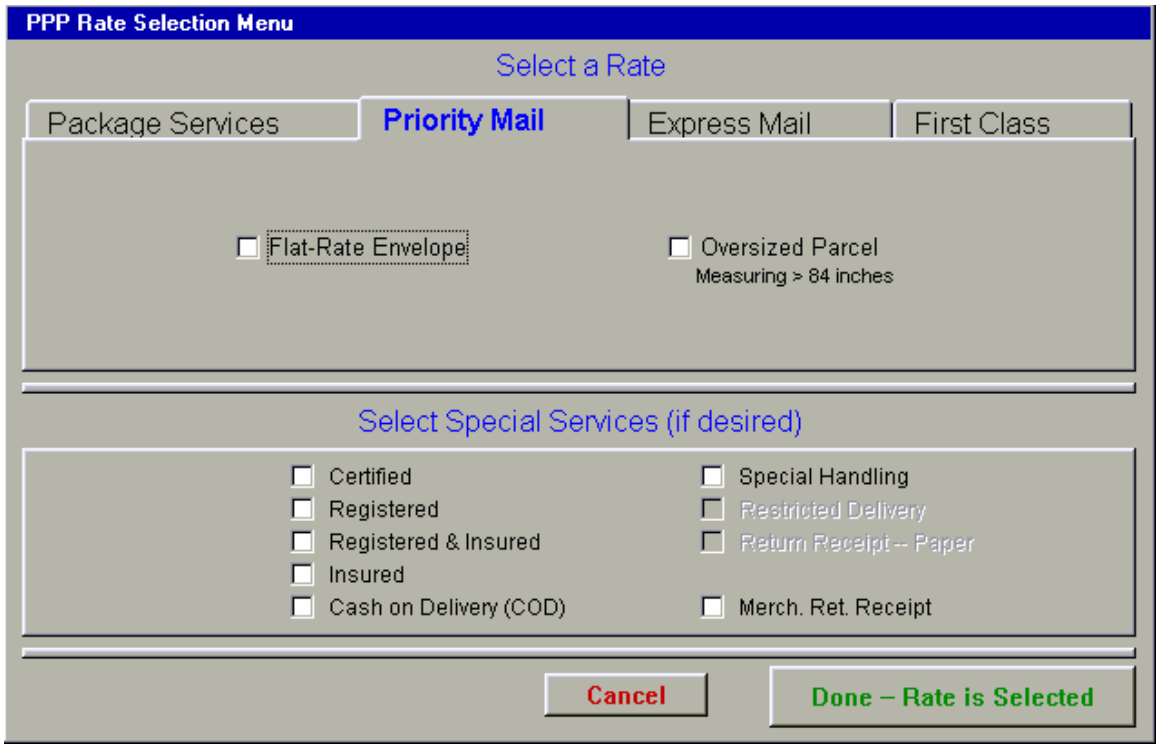
Manual:

Click the Daily Shipping button on the main Navigator screen.

Click the Package Info tab and type in the information that pertains to your package in the appropriate text boxes.



Click on the Rate button, select the class of mail, then click the Done button.



Click on the radio button for either Delivery Confirmation or Signature Confirmation if you plan to use one of these features.

Place the package on the scale and ensure that the weight registers on the computer screen. Click on the Print Label button to print a label for the package.

Click on the Save Only button if you wish to print all of your labels at once in the Print Labels screen.

Follow the End of Day Procedures for uploading a manifest and printing reports.

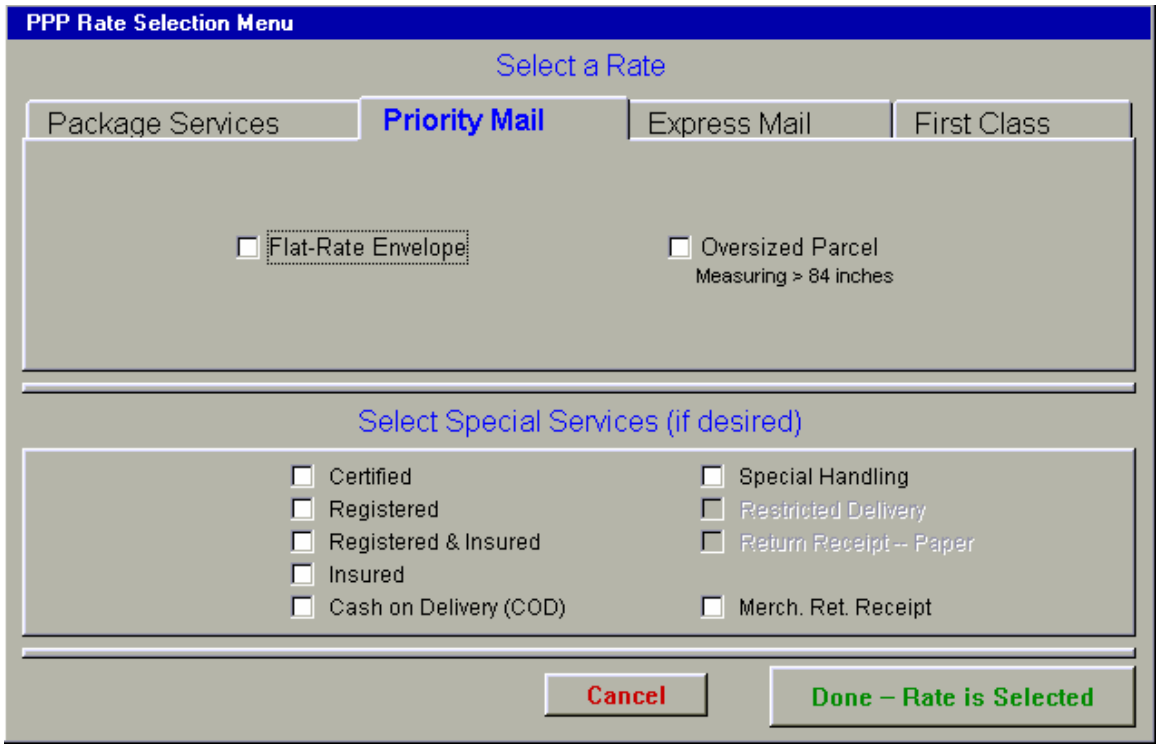
Import:

Determine whether you are using an Addressee or a Package file.

Determine whether you are performing a Standard or Advanced Connectivity import.

Enter Customer/Package identifier from a pick ticket, scanner, database, etc.

Click on the Rate button, select the class of mail (if not included in the import configuration), then click the Done button.



Click on the radio button for either Delivery Confirmation or Signature Confirmation if you plan to use one of these features (if not included in the import configuration).

Place the package on the scale and insure that the weight is entered into the program (if not included in the import configuration).

Click the Print Label button to print a label for the package.

Click the Save Only button if you wish to print all of your labels at once in the Print Labels screen. Follow the End of Day Procedures for uploading a manifest and printing reports.

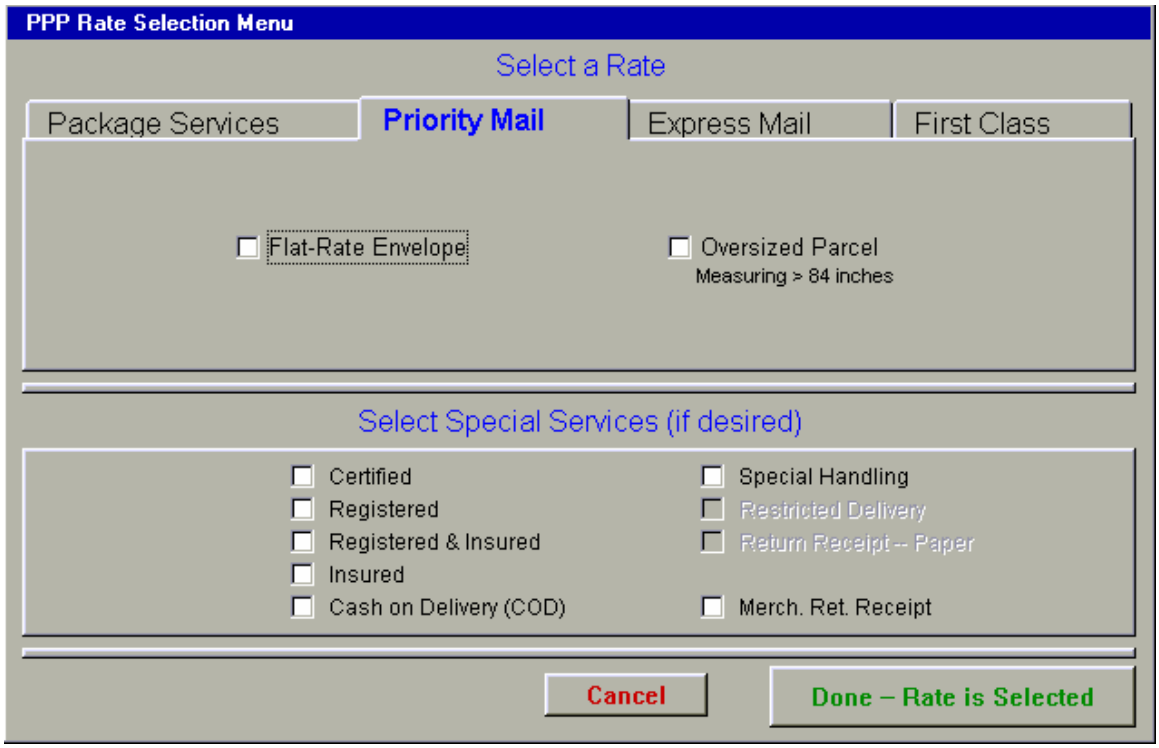
Importing Packages

Determine whether you are using doing an Addressee or a Package import.

Determine whether you are performing a Standard or Advanced Connectivity import.

Enter the Addressee Number or Package ID from a pick ticket, scanner, database, etc.

Click on the Rate button, select the class of mail (if not included in the import configuration), then click the Done button.



Click on the radio button for either Delivery Confirmation or Signature Confirmation if you plan to use one of these features (if not already included in the import).

Place the package on the scale and enter the weight into the program (if not already included in the import).

Click the Print Label button to print a label for the package.

Click the Save Only button if you wish to print all of your labels at once in the Print Labels screen.

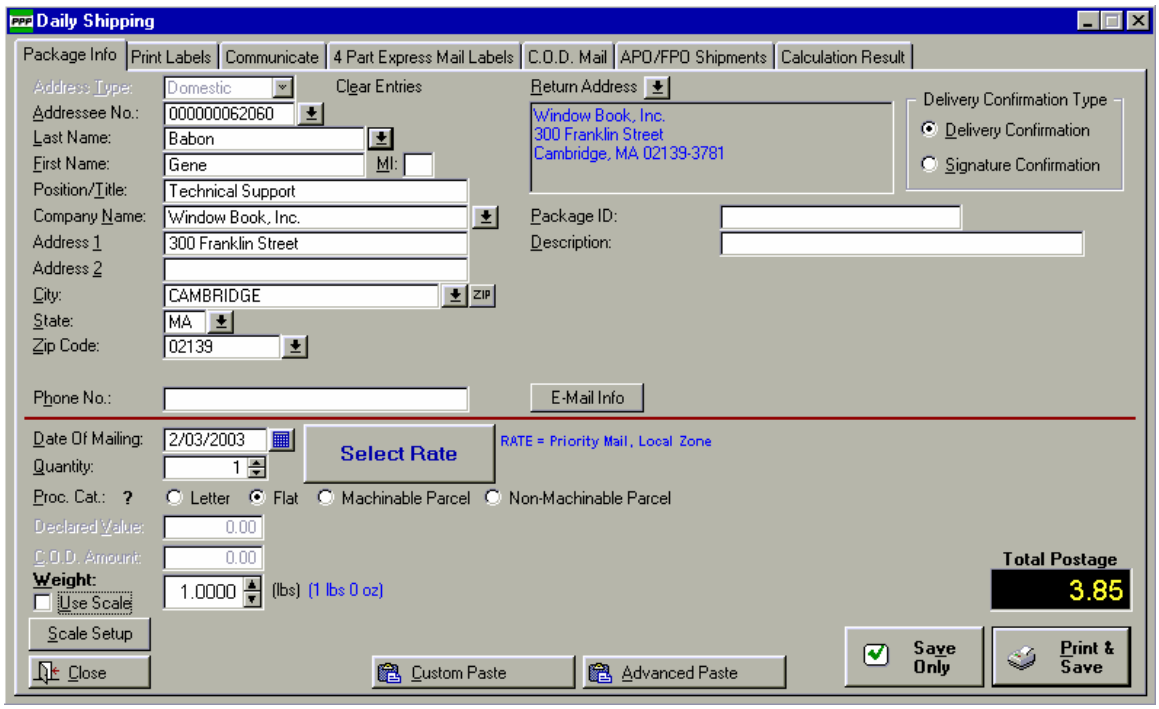
Follow the End of Day Procedures for uploading a manifest and printing reports.

Creating A Package By Hand

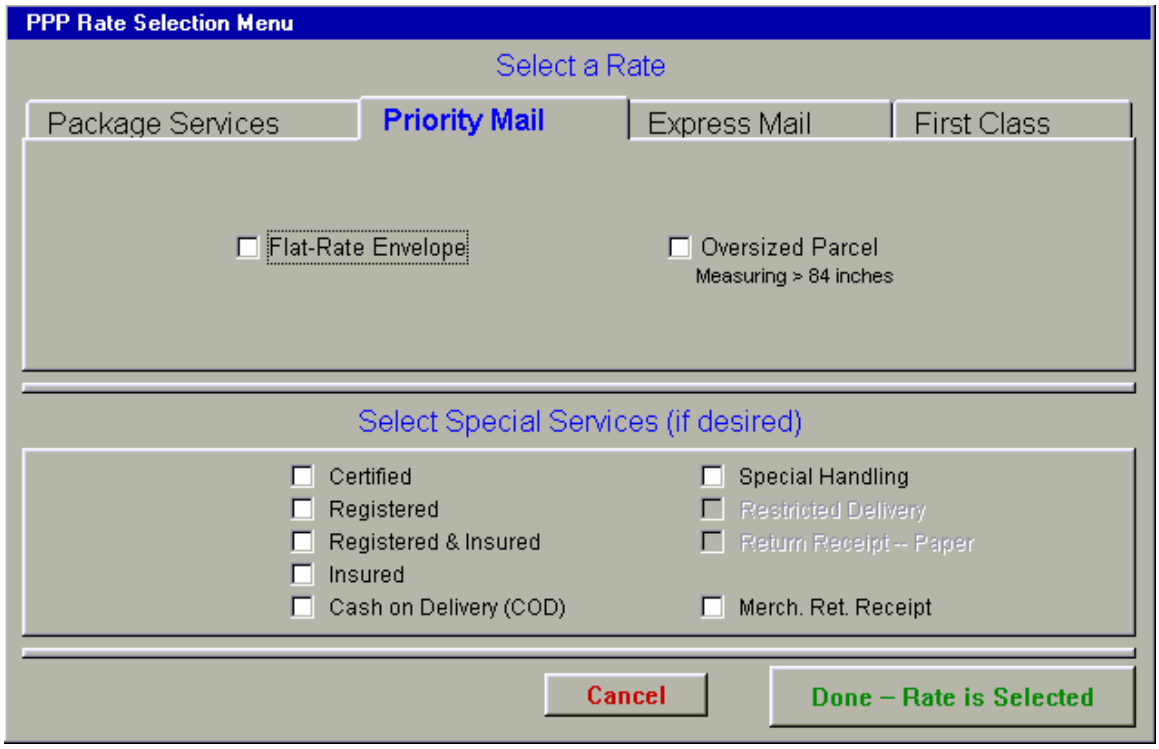
To create a package manually:

Click the Daily Shipping button on the main Navigator screen.

Click the Package Info tab and type in the appropriate address information.



Click on the Rate button, select the class of mail, then click the "Done" button.



Click on the radio button for either Delivery Confirmation or Signature Confirmation if you are using either of these.

Place the package on the scale and ensure that the weight registers on the computer screen.

Click on the Print Label button to print a package label, or

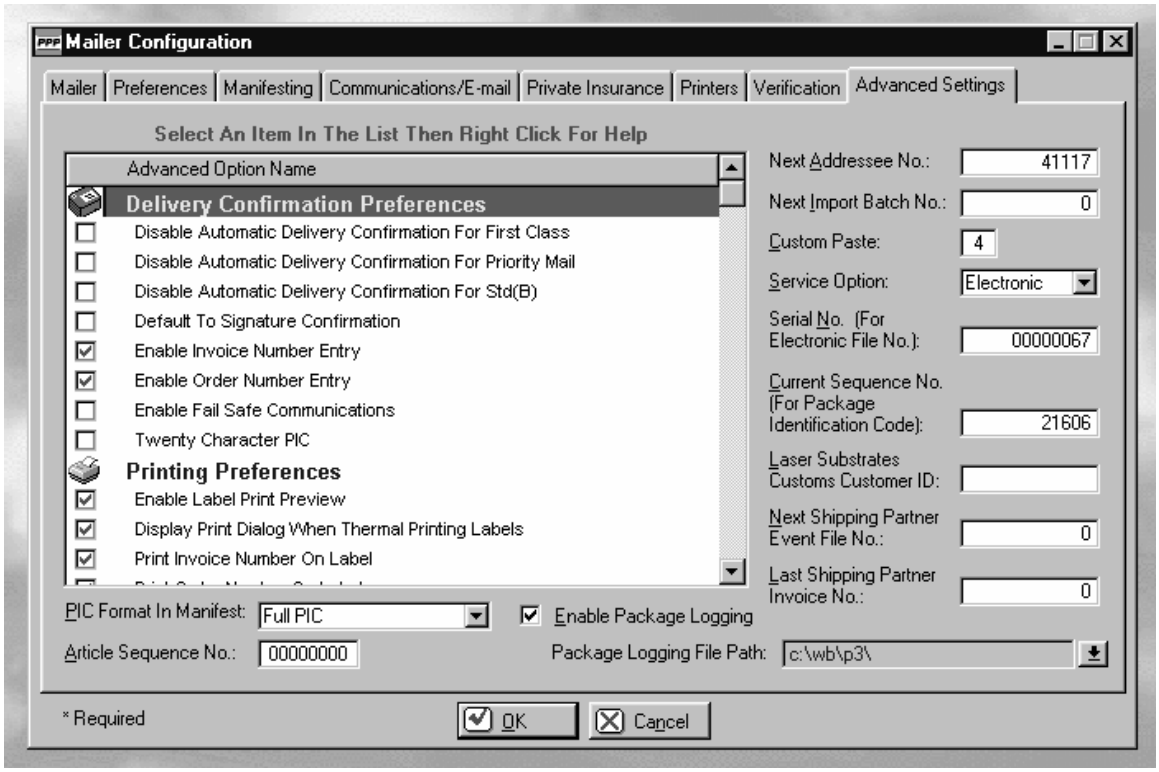
Click the Save Only button to save the label without printing it. You can then later print all of your labels at once from the Print Labels screen, which may be more efficient.

Follow the End of Day Procedures for uploading a manifest and printing reports.

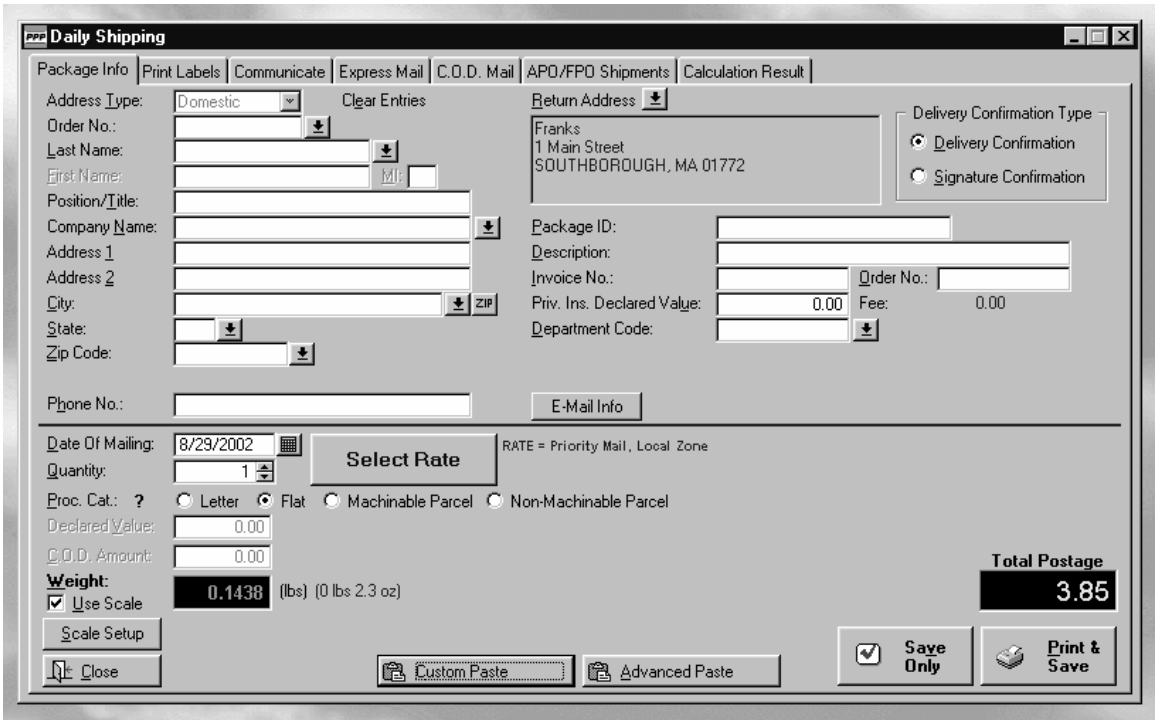
Custom Paste For Yahoo Store Owners

This feature is designed for users of Postal Package Partner who have also set up a Yahoo! Store .

Open File => System Setup => Mailer Configuration => Advanced Settings. In the far right of the Advanced Settings Tab (in the grey area) there is a field called Custom Paste. Enter the number 4 in this field. Click OK to close Mailer Configuration.



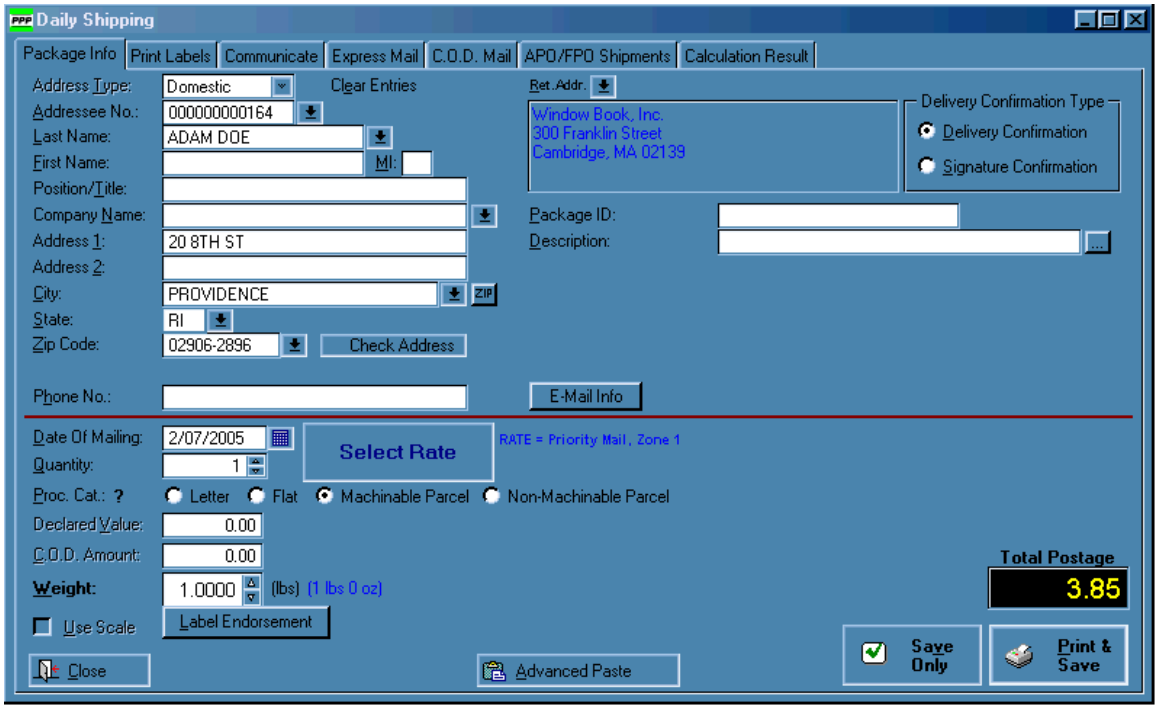
When you open Daily Shipping => Package Info you will now notice a Custom Paste button at the bottom of the window.



Open your Yahoo e-mail order and use Select All (CTRL A) and Copy All (CTRL C). Then, in PPP, click Custom Paste button. The ship to address information and email, etc. should be brought into Package Info.

Package Info Tab

This is the tab that you use to create your packages manually or via ODBC.



Print Labels Tab

Tagging Packages

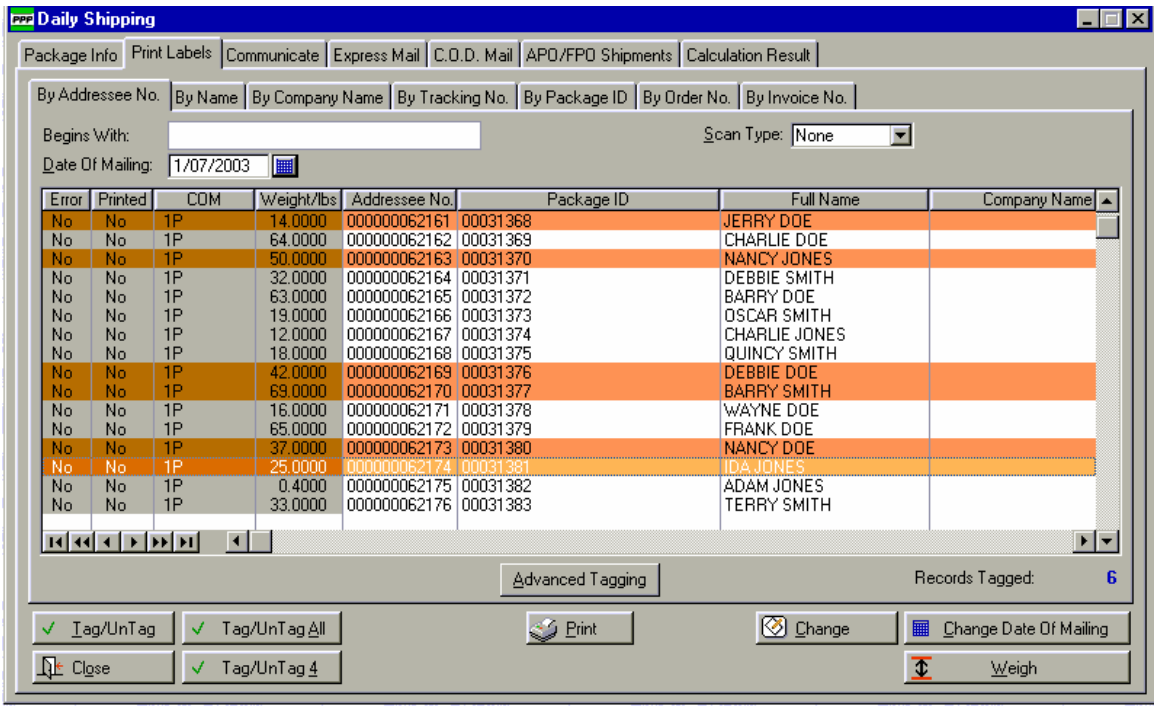
Using Windows Tagging Conventions

This browse uses standard Windows tagging conventions.

The primary way you should do your tagging, unless you are tagging all records or special groups of records with the Advanced Tagging feature, is to use these conventions. This is the preferred way to do the tagging:

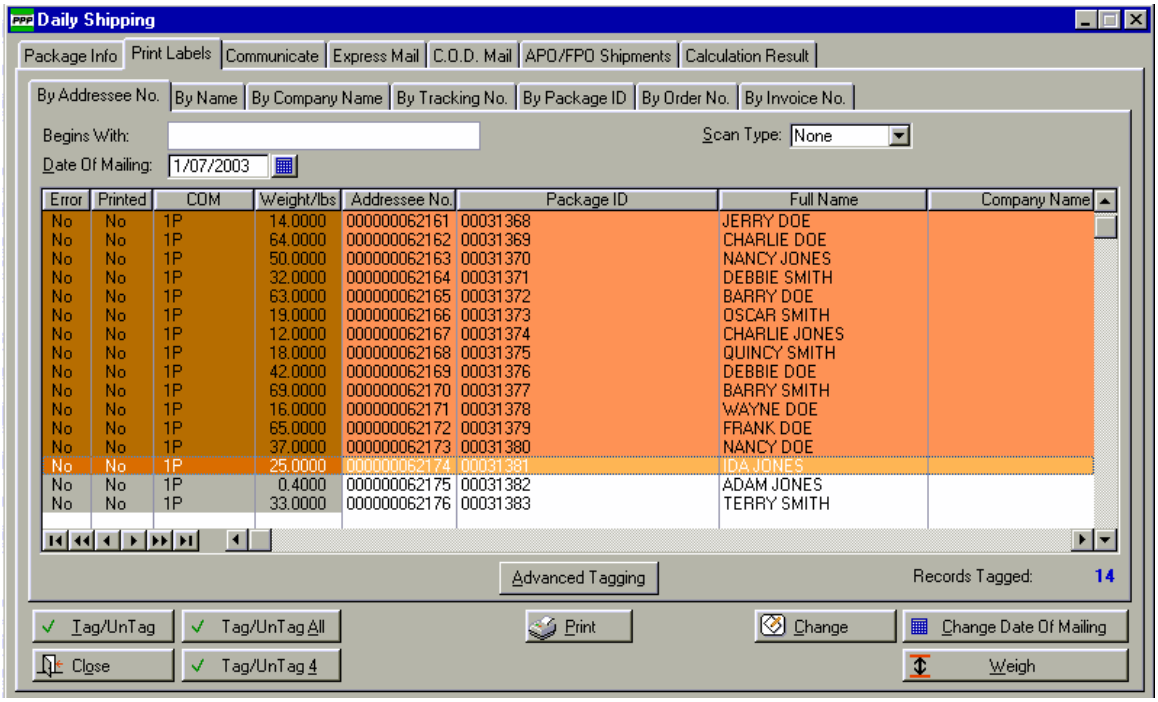
To Mark Individual Records

Left Click on the first item. Hold the <Control> Key down and then left click on all other items you want to mark.


Daily Shipping
Package Info
Print Labels
Communicate
Express Mail
C.O.D. Mail
APO/FPO Shipments
Calculation Result
By Addressee No.
By Name
By Company Name
By Tracking No.
By Package ID
By Order No.
By Invoice No.
Begins With:
Scan Type: None
Date Of Mailing: 1/07/2003
Error Printed COM Weight/lbs Addressee No. Package ID Full Name Company Name
No No 1P 14.0000 000000062161 00031368 JERRY DOE
No No 1P 64.0000 000000062162 00031369 CHARLIE DOE
No No 1P 50.0000 000000062163 00031370 NANCY JONES
No No 1P 32.0000 000000062164 00031371 DEBBIE SMITH
No No 1P 63.0000 000000062165 00031372 BARRY DOE
No No 1P 19.0000 000000062166 00031373 OSCAR SMITH
No No 1P 12.0000 000000062167 00031374 CHARLIE JONES
No No 1P 18.0000 000000062168 00031375 QUINCY SMITH
No No 1P 42.0000 000000062169 00031376 DEBBIE DOE
No No 1P 69.0000 000000062170 00031377 BARRY SMITH
No No 1P 16.0000 000000062171 00031378 WAYNE DOE
No No 1P 65.0000 000000062172 00031379 FRANK DOE
No No 1P 37.0000 000000062173 00031380 NANCY DOE
No No 1P 25.0000 000000062174 00031381 IDA JONES
No No 1P 0.4000 000000062175 00031382 ADAM JONES
No No 1P 33.0000 000000062176 00031383 TERRY SMITH
Advanced Tagging
Records Tagged: 6
Tag/UnTag
Tag/UnTag All
Print
Change
Change Date Of Mailing
Close
Tag/UnTag 4
Weigh

To Mark a Block of Records

Left Click on the first item. Hold the Shift key down and then left click on the last item.

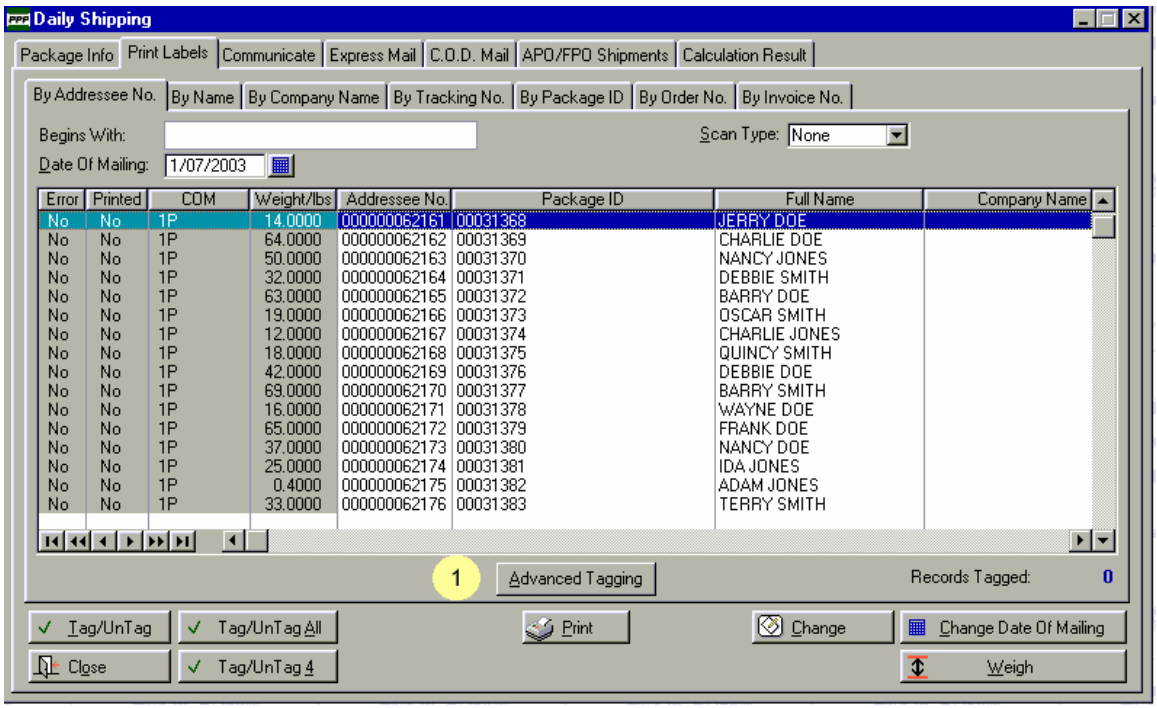

Daily Shipping
Package Info
Print Labels
Communicate
Express Mail
C.O.D. Mail
APO/FPO Shipments
Calculation Result
By Addressee No.
By Name
By Company Name
By Tracking No.
By Package ID
By Order No.
By Invoice No.
Begins With:
Scan Type: None
Date Of Mailing: 1/07/2003
Error | Printed | COM | Weight/lbs | Addressee No. | Package ID | Full Name | Company Name
No | No | 1P | 14.0000 | 000000062161 | 00031368 | JERRY DOE
No | No | 1P | 64.0000 | 000000062162 | 00031369 | CHARLIE DOE
No | No | 1P | 50.0000 | 000000062163 | 00031370 | NANCY JONES
No | No | 1P | 32.0000 | 000000062164 | 00031371 | DEBBIE SMITH
No | No | 1P | 63.0000 | 000000062165 | 00031372 | BARRY DOE
No | No | 1P | 19.0000 | 000000062166 | 00031373 | OSCAR SMITH
No | No | 1P | 12.0000 | 000000062167 | 00031374 | CHARLIE JONES
No | No | 1P | 18.0000 | 000000062168 | 00031375 | QUINCY SMITH
No | No | 1P | 42.0000 | 000000062169 | 00031376 | DEBBIE DOE
No | No | 1P | 69.0000 | 000000062170 | 00031377 | BARRY SMITH
No | No | 1P | 16.0000 | 000000062171 | 00031378 | WAYNE DOE
No | No | 1P | 65.0000 | 000000062172 | 00031379 | FRANK DOE
No | No | 1P | 37.0000 | 000000062173 | 00031380 | NANCY DOE
No | No | 1P | 25.0000 | 000000062174 | 00031381 | IDA JONES
No | No | 1P | 0.4000 | 000000062175 | 00031382 | ADAM JONES
No | No | 1P | 33.0000 | 000000062176 | 00031383 | TERRY SMITH
Advanced Tagging
Records Tagged: 14
Tag/UnTag
Tag/UnTag All
Print
Change
Change Date Of Mailing
Close
Tag/UnTag 4
Weigh

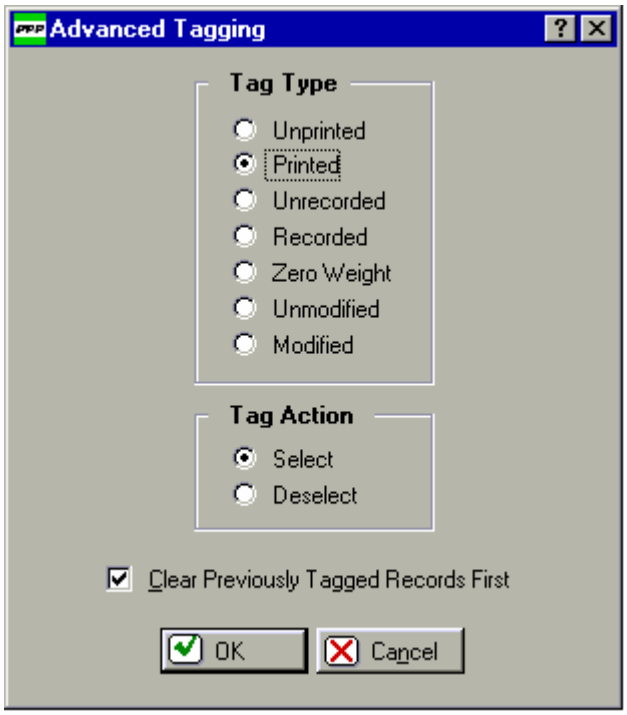
Using the Tag/Untag Button

Highlight the first item to tag and press the Tag/UnTag button. **YOU MUST HOLD DOWN THE CONTROL KEY** when moving to the next item when using the UP or Down Arrow keys to navigate!

Advanced Tagging

By clicking the Advanced Tagging button (1) you will get a menu of the tag types which may either be Selected or De-selected.


Daily Shipping
Package Info
Print Labels
Communicate
Express Mail
C.O.D. Mail
APO/FPO Shipments
Calculation Result
By Addressee No.
By Name
By Company Name
By Tracking No.
By Package ID
By Order No.
By Invoice No.
Begins With:
Scan Type: None
Date Of Mailing: 1/07/2003
Error | Printed | COM | Weight/lbs | Addressee No. | Package ID | Full Name | Company Name
No | No | 1P | 14.0000 | 000000062161 | 00031368 | JERRY DOE
No | No | 1P | 64.0000 | 000000062162 | 00031369 | CHARLIE DOE
No | No | 1P | 50.0000 | 000000062163 | 00031370 | NANCY JONES
No | No | 1P | 32.0000 | 000000062164 | 00031371 | DEBBIE SMITH
No | No | 1P | 63.0000 | 000000062165 | 00031372 | BARRY DOE
No | No | 1P | 19.0000 | 000000062166 | 00031373 | OSCAR SMITH
No | No | 1P | 12.0000 | 000000062167 | 00031374 | CHARLIE JONES
No | No | 1P | 18.0000 | 000000062168 | 00031375 | QUINCY SMITH
No | No | 1P | 42.0000 | 000000062169 | 00031376 | DEBBIE DOE
No | No | 1P | 69.0000 | 000000062170 | 00031377 | BARRY SMITH
No | No | 1P | 16.0000 | 000000062171 | 00031378 | WAYNE DOE
No | No | 1P | 65.0000 | 000000062172 | 00031379 | FRANK DOE
No | No | 1P | 37.0000 | 000000062173 | 00031380 | NANCY DOE
No | No | 1P | 25.0000 | 000000062174 | 00031381 | IDA JONES
No | No | 1P | 0.4000 | 000000062175 | 00031382 | ADAM JONES
No | No | 1P | 33.0000 | 000000062176 | 00031383 | TERRY SMITH
1
Advanced Tagging
Records Tagged: 0
Tag/UnTag
Tag/UnTag All
Print
Change
Change Date Of Mailing
Close
Tag/UnTag 4
Weigh



The **Printed/Unprinted** radio buttons are used to mark or unmark which

labels have been printed/not been printed.

The **Unrecorded/Recorded** radio buttons are used to mark or unmark which packages are checkmarked on the End-of-Day Report, and verifies that they have been scanned for shipment. Any package that has **not** been scanned will show up as unchecked on the End-of-Day Report.

The **Zero Weight** button identifies packages that have net been weighed.

The **Modified/Unmodified** buttons are used to identify packages that have been changed or are intact from their original processing.

Keystroke Shortcuts

Additional Windows Tagging Conventions that are now supported in PPP include the following:

Enabled mouse keystrokes

- ***Single-Click -*** marks a record, reverts to single select mode if range is selected
- **Ctrl-Click** - toggles a record marked/unmarked without affecting other marked records
- ***Shift-Click -*** mark a range of records between last Single-Click/Shift-Click/Ctrl-Click

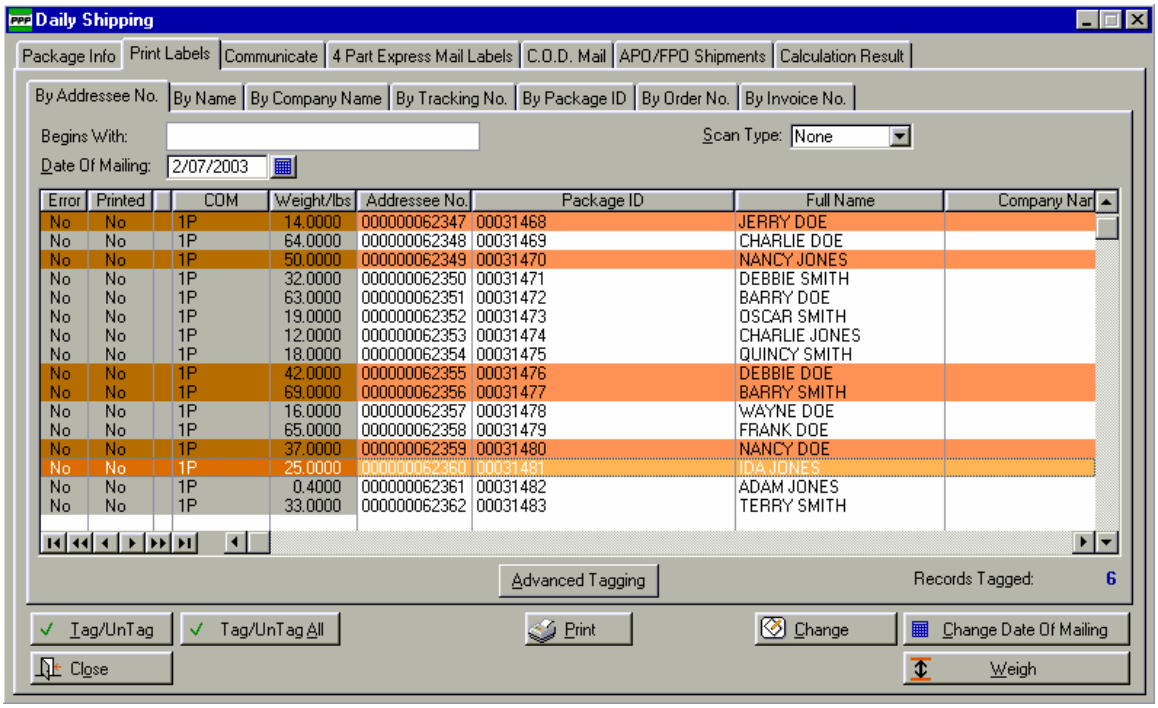
Enabled keyboard keystrokes

- ***Down Key -*** unselects all records and moves down one record from last selected
- ***Up Key -*** unselects all records and moves up one record from last selected
- ***Shift-Down Key -*** marks/unmarks the next record
- ***Shift-Up Key -*** marks/unmarks the previous record
- ***Shift-Home Key -*** marks all records from selected record to (and including) the first record
- ***Shift-End Key -*** marks all records from selected record to (and including) the last record
- ***Shift-PageDownKey -*** marks all records from selected record to end of current page
- ***Shift-PageUpKey -*** marks all records from selected record to top of current page
- ***Space Key -*** same effect as single click on currently selected record but also moves to the next record in the browse
- ***Ctrl-Space Key -*** same effect as Space Key on currently selected record
- ***Ctrl-Up Key -*** moves cursor to previous record without affecting tagging
- ***Ctrl-Down Key -*** move cursor to next record without affecting tagging
- ***Ctrl-A -*** selects all records

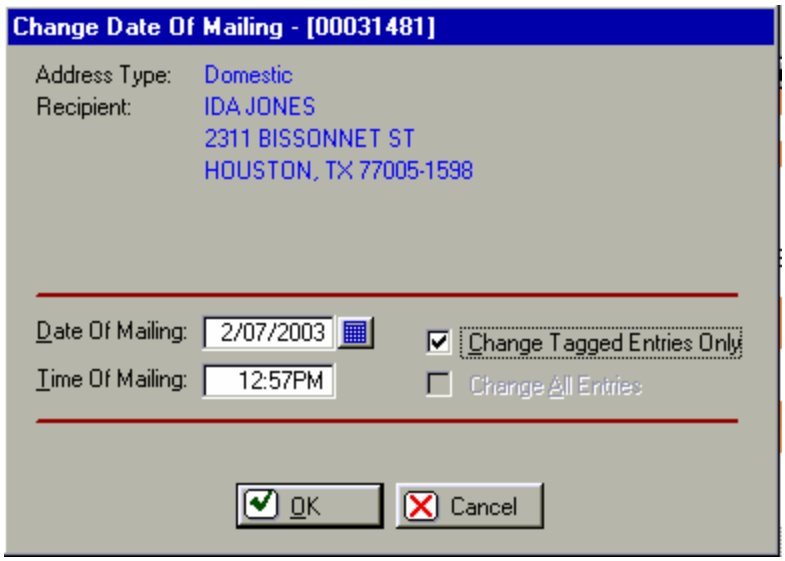
Change Date of Mailing

If you have imported or otherwise created packages on a certain date and you are not shipping those packages on that date then you need to change the Date of Mailing for those packages as follows:

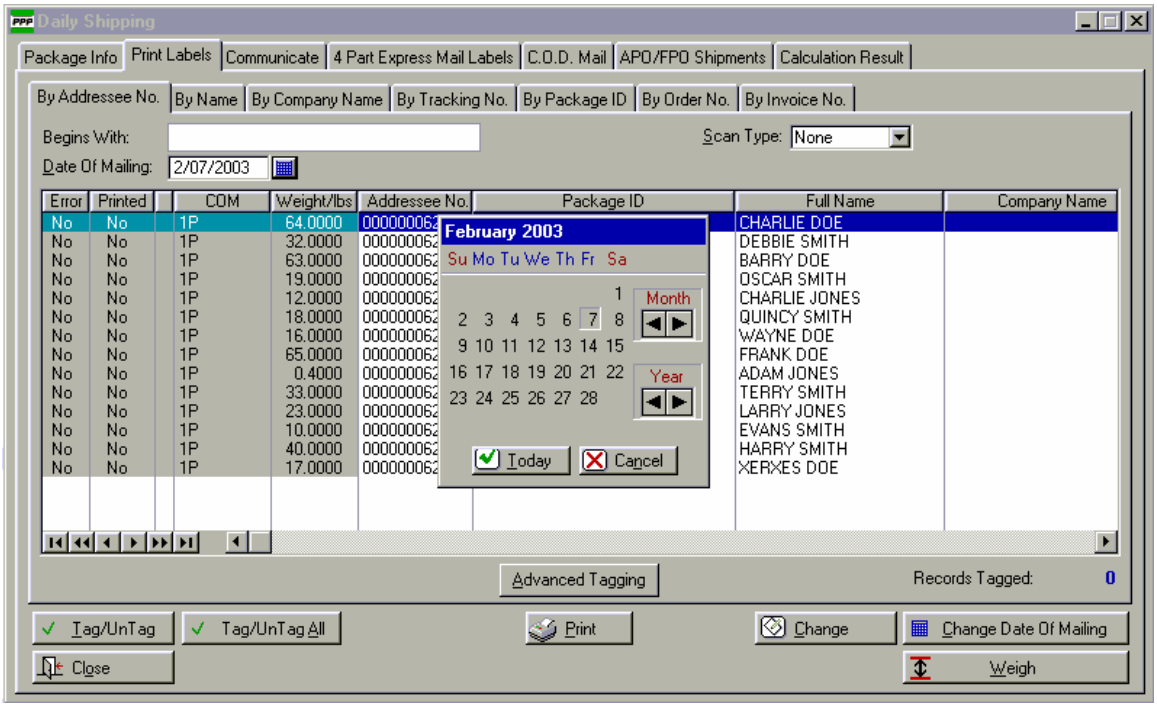
Click the Daily Shipping button on the main Navigator window Click the Print Labels tab Highlight or tag the packages you wish to change using the Tagging Packages.

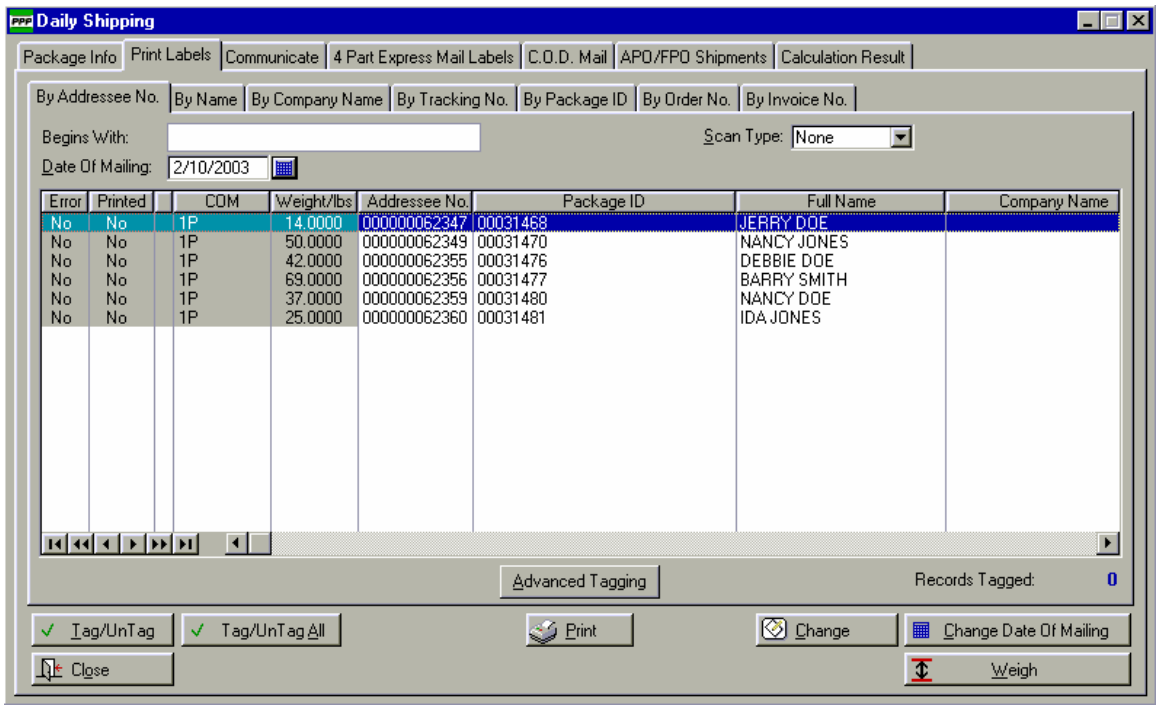

Daily Shipping
Package Info
Print Labels
Communicate
4 Part Express Mail Labels
C.O.D. Mail
APO/FPO Shipments
Calculation Result
By Addressee No.
By Name
By Company Name
By Tracking No.
By Package ID
By Order No.
By Invoice No.
Begins With:
Scan Type: None
Date Of Mailing: 2/07/2003
Error | Printed | COM | Weight/lbs | Addressee No. | Package ID | Full Name | Company Nar
No | No | 1P | 14.0000 | 000000062347 | 00031468 | JERRY DOE
No | No | 1P | 64.0000 | 000000062348 | 00031469 | CHARLIE DOE
No | No | 1P | 50.0000 | 000000062349 | 00031470 | NANCY JONES
No | No | 1P | 32.0000 | 000000062350 | 00031471 | DEBBIE SMITH
No | No | 1P | 63.0000 | 000000062351 | 00031472 | BARRY DOE
No | No | 1P | 19.0000 | 000000062352 | 00031473 | OSCAR SMITH
No | No | 1P | 12.0000 | 000000062353 | 00031474 | CHARLIE JONES
No | No | 1P | 18.0000 | 000000062354 | 00031475 | QUINCY SMITH
No | No | 1P | 42.0000 | 000000062355 | 00031476 | DEBBIE DOE
No | No | 1P | 69.0000 | 000000062356 | 00031477 | BARRY SMITH
No | No | 1P | 16.0000 | 000000062357 | 00031478 | WAYNE DOE
No | No | 1P | 65.0000 | 000000062358 | 00031479 | FRANK DOE
No | No | 1P | 37.0000 | 000000062359 | 00031480 | NANCY DOE
No | No | 1P | 25.0000 | 000000062360 | 00031481 | IDA JONES
No | No | 1P | 0.4000 | 000000062361 | 00031482 | ADAM JONES
No | No | 1P | 33.0000 | 000000062362 | 00031483 | TERRY SMITH
Advanced Tagging
Records Tagged: 6
Tag/UnTag
Tag/UnTag All
Print
Change
Change Date Of Mailing
Close
Weigh

Click the Change Date of Mailing button



Check the Change Tagged Entries Only checkbox. Change the date of mailing by clicking the clicking the calendar icon. Click OK. Selected packages have disappeared from the current date of mailing; confirm that they have been moved to the new date of mailing by clicking the calendar icon next to Date of Mailing.




Daily Shipping
Package Info
Print Labels
Communicate
4 Part Express Mail Labels
C.O.D. Mail
APO/FPO Shipments
Calculation Result
By Addressee No.
By Name
By Company Name
By Tracking No.
By Package ID
By Order No.
By Invoice No.
Begins With:
Scan Type: None
Date Of Mailing: 2/10/2003
Error
Printed
COM
Weight/lbs
Addressee No.
Package ID
Full Name
Company Name
No No 1P 14.0000 000000062347 00031468 JERRY DOE
No No 1P 50.0000 000000062349 00031470 NANCY JONES
No No 1P 42.0000 000000062355 00031476 DEBBIE DOE
No No 1P 69.0000 000000062356 00031477 BARRY SMITH
No No 1P 37.0000 000000062359 00031480 NANCY DOE
No No 1P 25.0000 000000062360 00031481 IDA JONES
Advanced Tagging
Records Tagged: 0
Tag/UnTag
Tag/UnTag All
Print
Change
Change Date Of Mailing
Close
Weigh

Communicate Tab

How To Communicate Packages To The US Postal Service

Uploading files to the USPS (i.e. "communicating") is part of the End-of-Day Procedures as follows:

After you have finished entering all of your package information in the "Package Information" tab of "Daily Shipping" and have printed and affixed the labels, go to the "Communicate" tab. Make sure that the manifest is correct, and push the "Communicate" button.

PPP will ask, "Do you want to print the End-of-Day Report?".

Print the report for your records. The post office may also want a copy.

PPP will then ask, "Do you want to print Form 3152?".

Print the report for presentation with your packages. You may also want a copy for your records. Allow the upload to finish, making sure that it was successful. If it was unsuccessful, check your Internet connection and your network for service problems, and then resend. After the upload is complete go to the "Navigator" and click on "Reports". On the "Reports" page click on "Statements and Manifests".

The following options will appear: In PPP (Advanced) there will be 11 report choices. The necessary reports will be checked for printing according to the requirements of your manifest.

Print these reports and present them with your packages at the post office. You may also want to make copies for your records.

In PPP (Gold) there will be just one report, the Gold Manifest. Print this report and present it with your packages.

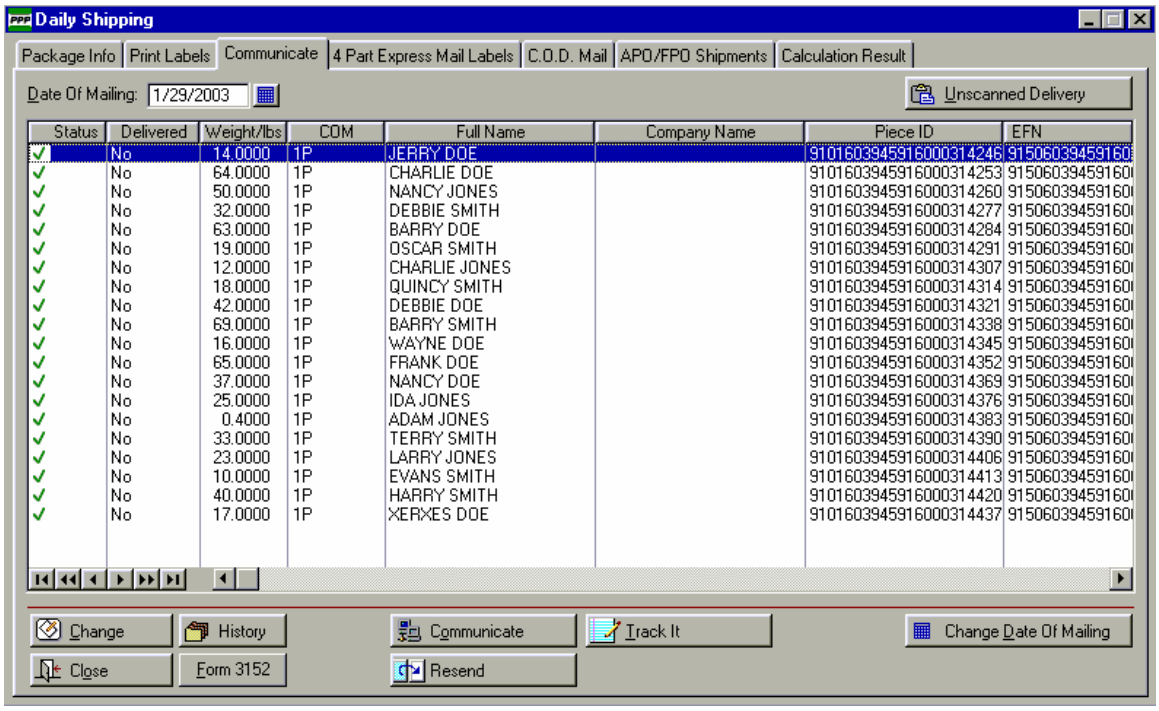
In PPP (Standard) there will be 7 options. The necessary reports will be checked for printing according to the requirements of your manifest.

Print these reports and present them with your packages at the post office. You may also want to make copies for your records.
The End-of-Day Procedure is complete.

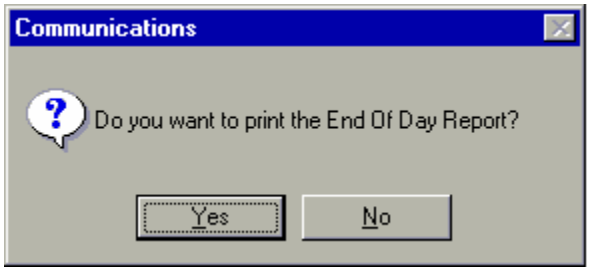
Communicating and Printing Statements & Manifests

After you have finished entering all of your package information in the "Package Information" tab of "Daily Shipping" and have printed and affixed the labels, go to the "Communicate" tab.

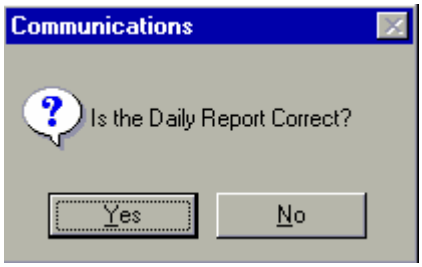
Make sure that the manifest is correct, and click the "Communicate" button.



PPP will ask, "Do you want to print the End-of-Day Report?". Click Yes and print the report for your records. The post office may also want a copy.



Review the Report and make sure it is correct.

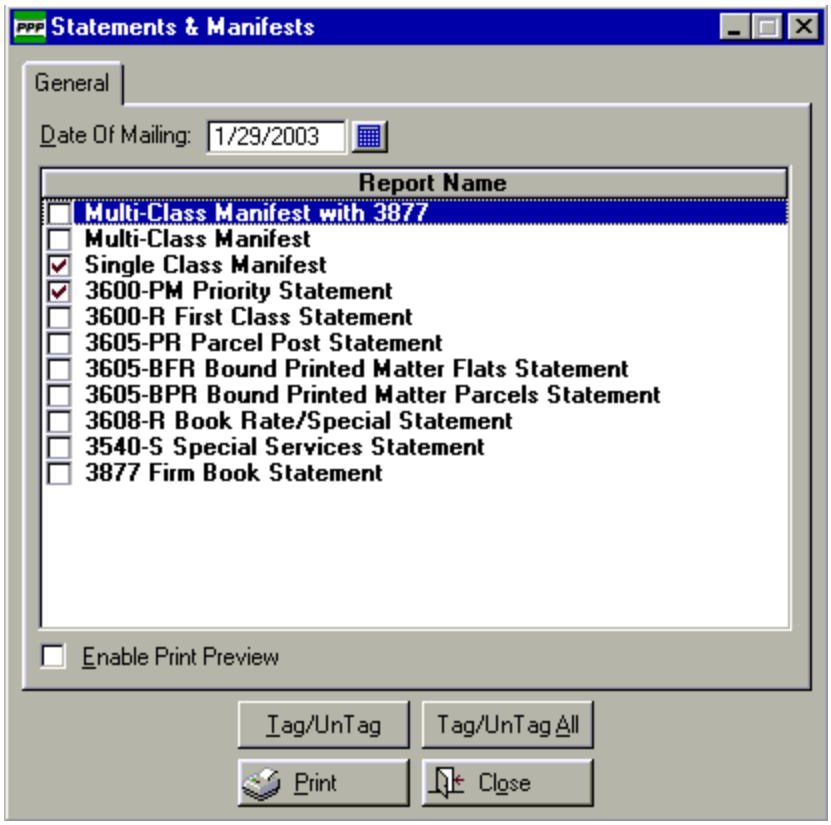


PPP will then ask, "Do you want to print Form 3152?". Print the report for presentation with your packages. You may also want a copy for your records.

Allow the upload to finish, making sure that it was successful. If it was unsuccessful, check your Internet connection and your network for service problems, and then resend.

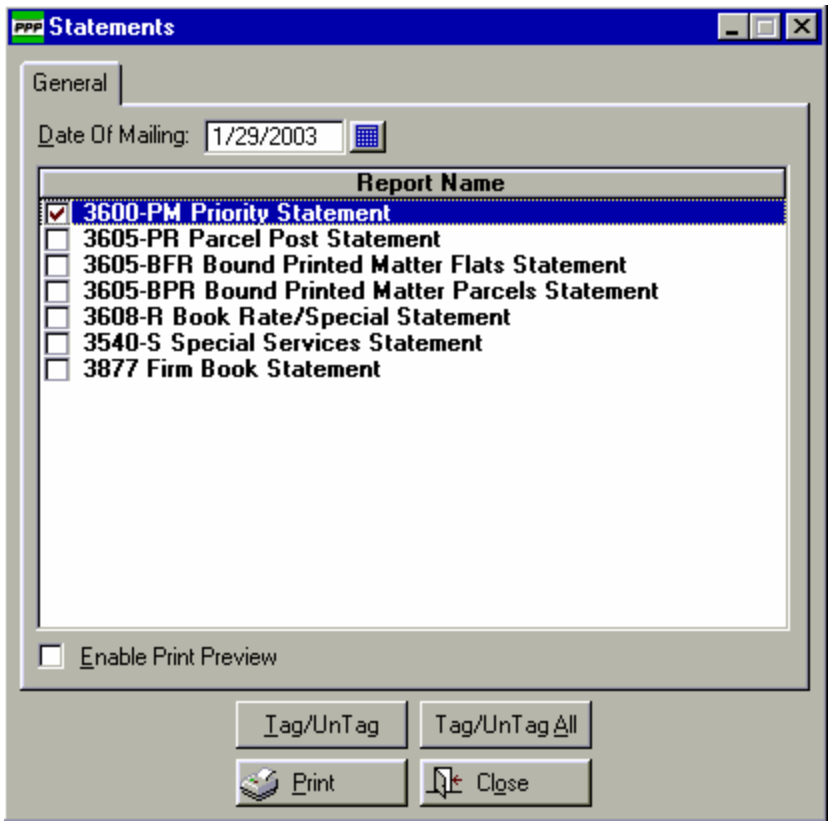
After the upload is complete go to the "Navigator" and click on "Reports". On the "Reports" page click on "Statements and Manifests". The following options will appear:

In PPP(Advanced) there will be 11 report choices. The necessary reports will be checked for printing according to the requirements of your manifest. Print these reports and present them with your packages at the post office. You may also want to make copies for your records.



In PPP(Gold) there will be just one report, the Gold Manifest. Additional reports will be checked for printing according to the requirements of your manifest. Print this report and present it with your packages.

In PPP(Standard) there will be 7 options. The necessary reports will be checked for printing according to the requirements of your manifest. Print these reports and present them with your packages at the post office. You may also want to make copies for your records.



The End-of-Day Procedure is complete.

USPS Upload Confirmation

Go to the File Menu, select System Maintenance, then select "Unconfirmed EFN List". This will give you a list of recent uploads which have no "confirmations" yet.

A confirmation is a downloaded error report or tracking data extract file for that manifest. You can view these reports and files by going to File => Communications Info => Download Log.

The date and 'EFN' number for each manifest is listed along with the communication status of the upload. If you see a manifest that was "Unsuccessful" on the Unconfirmed EFN List, you should resend the manifest by clicking the Resend button.

Communication Error Messages

Please check with your network administrator to ensure that there are open access ports in the network firewall that will allow for File Transfer Protocol (FTP) transfers (both incoming and outgoing).

Also, check with your Internet Service Provider (ISP) to make sure that your service has Forward and Reverse DNS enabled. This feature is required for the USPS server to accept data that it receives from your designated server.

If communications errors persist, pursue the options detailed in the **Troubleshooting Communication Problems** document.

Change Date of Mailing After Communicating

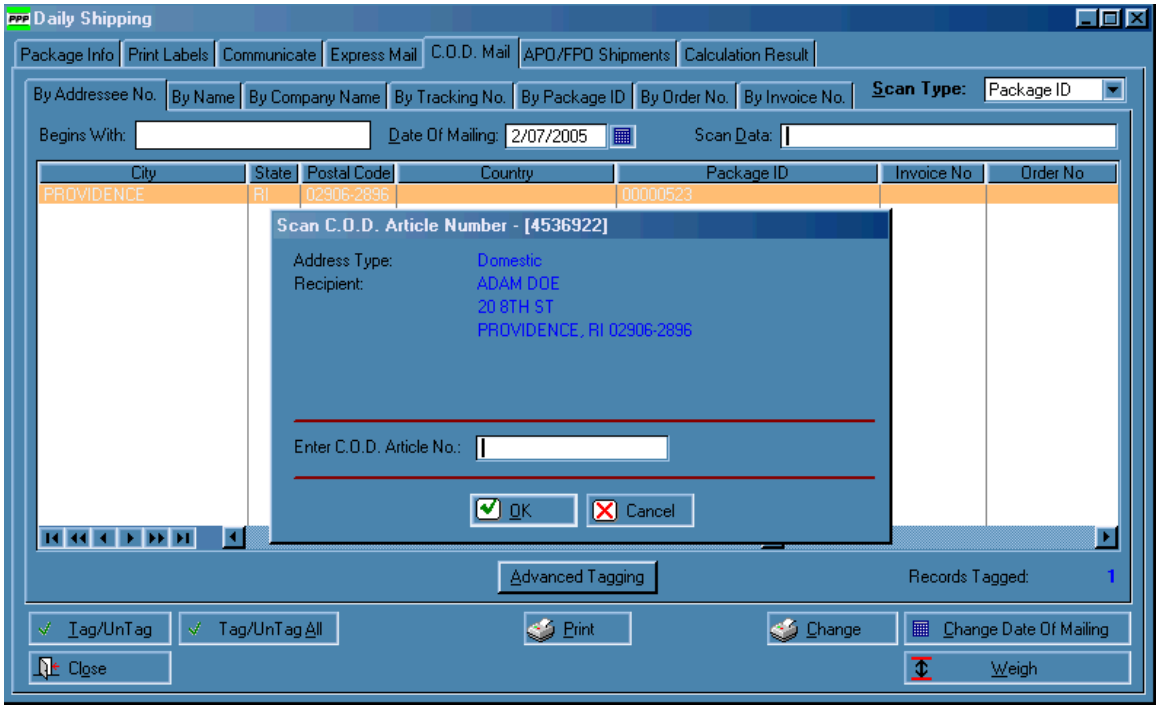
This should only be done for a very good reason -- Submit a Tech Support Question online if you are unsure whether to do this.

To change the Date of Mailing on a package that has already been communicated to the USPS server follow these steps:

1. Go to "Daily Shipping" on the Navigator Screen.
2. Click on the Communicate tab.
3. Highlight the record you want to change.
4. Click the Change button (lower left).
5. You will get a System Message -- Click "OK".
6. At the "System Password Required" screen, type in "system", then click "OK".
7. Go to the "Shipping Info" tab.
8. Change the date to the date you want, click "OK".
9. Go to that date in the "Print Labels" Screen and check to see that the package has been moved.
10. Repeat for any other packages you want to change.

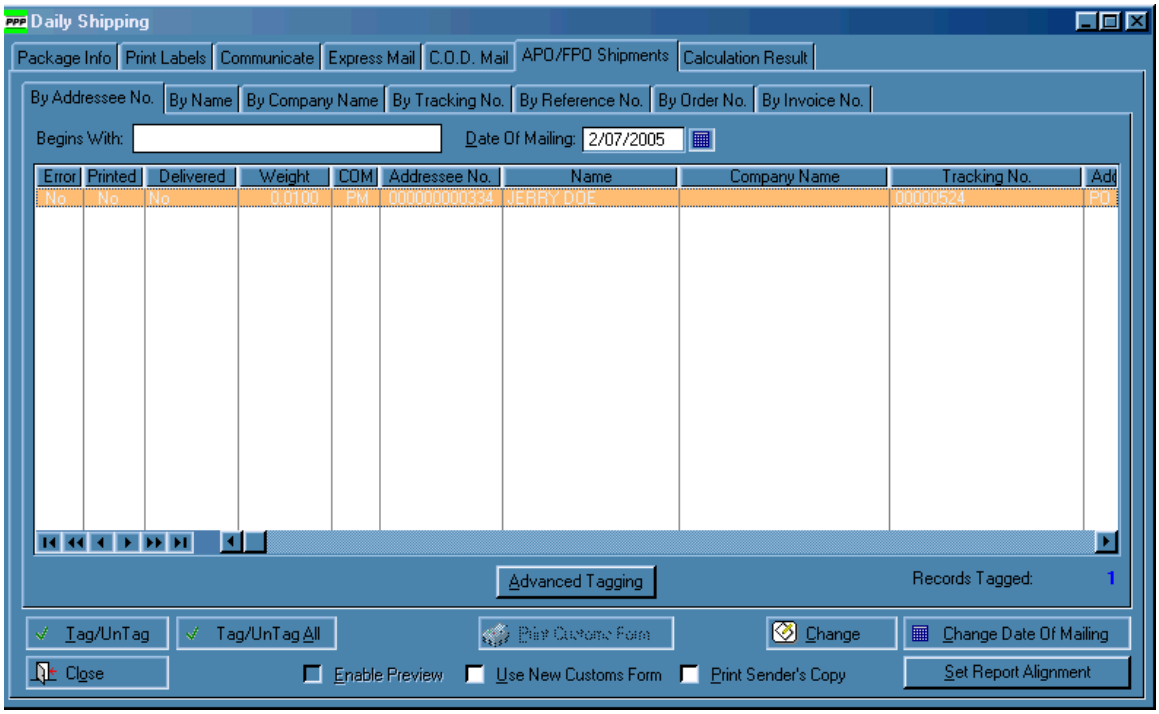
C.O.D. Tab

This is the tab where you scan your C.O.D. Article Number into PPP after creating a package using the C.O.D. Special Service.



APO/FPO Shipments Tab

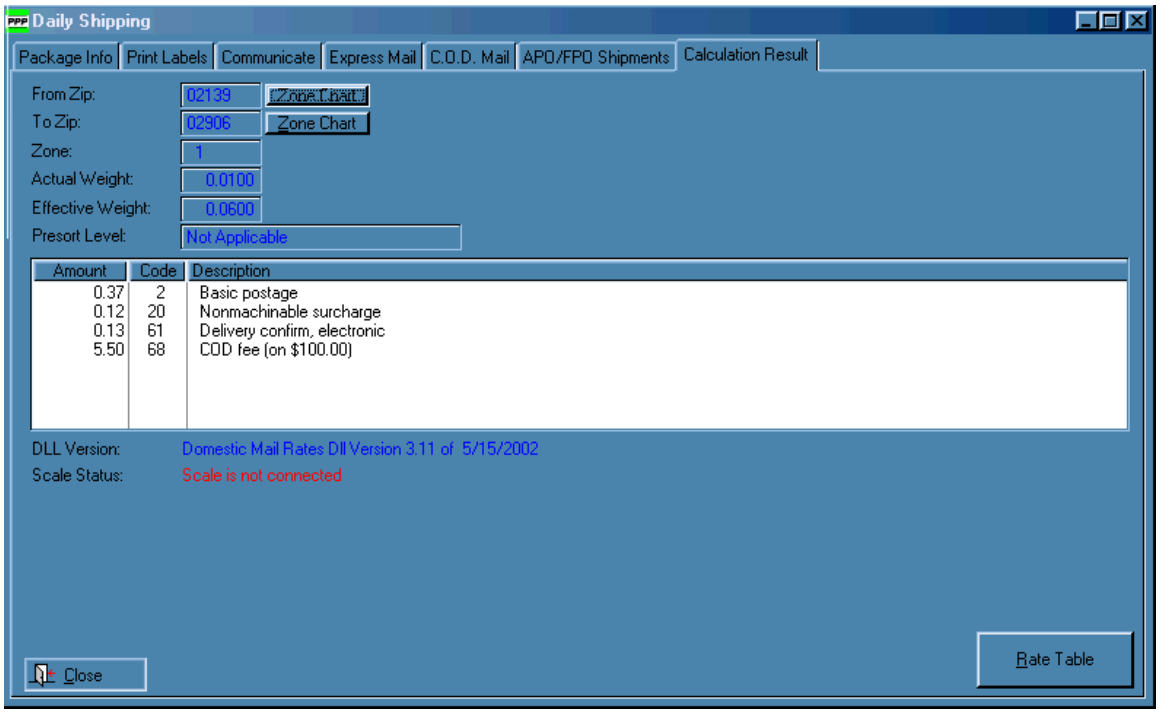
This is the tab that you go to if you need to reprint your Laser Substrates APO/FPO Custom Form.



Calculation Result Tab

This tab shows you how the Postage was calculated for a package that is entered on the "Package Info" Tab, breaking down all the fees associated with that particular package. If you would like to find out how much USPS is going to charge for any "Special Service" for a particular package, you can click on this tab before "Printing & Saving" the package.

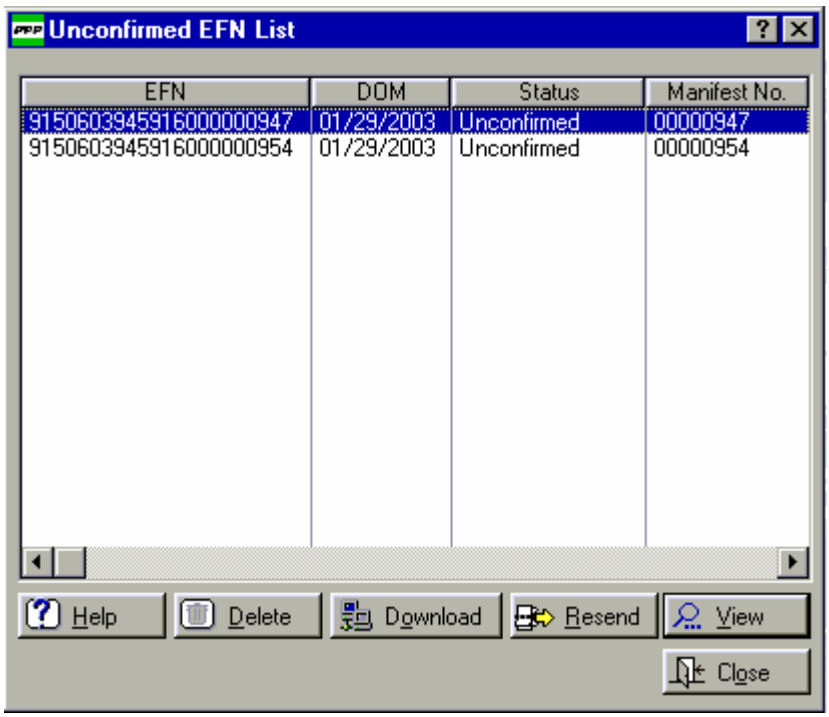
You can also print Zone Charts & Zone Matrixes from this tab, which the Post Office Requests from you when you go through your Manifest Approval Process.



Downloading Extract Files

Each morning when starting up Postal Package Partner, you should click the Download Extract Files located on the main Navigator menu.

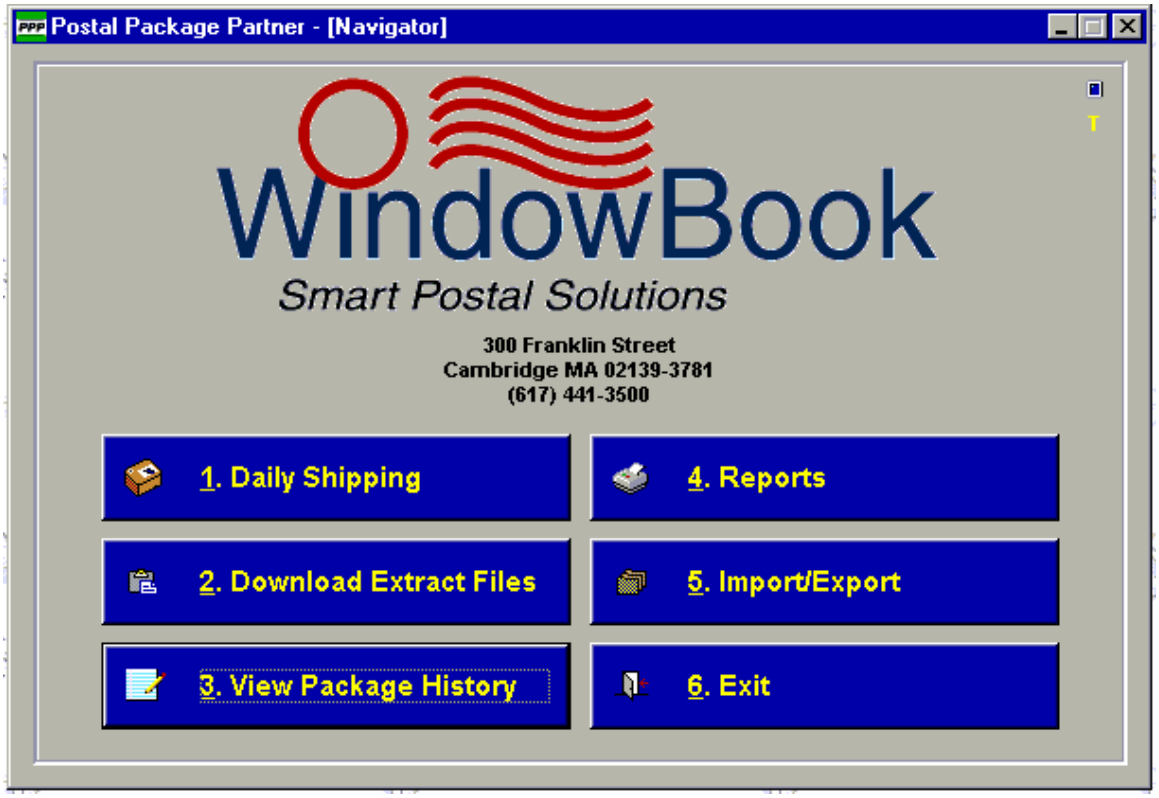
You should also go to File => Communications Info => Unconfirmed EFN List. This will give you a list of recent uploads which have no 'confirmations' yet. A confirmation is a downloaded error report or tracking data extract file for that manifest. The date and 'EFN' number for each manifest is listed along with the communication status of the upload. If you see a manifest that was UNSUCCESSFUL, you should click the Resend button.


Unconfirmed EFN List
EFN
DOM
Status
Manifest No.
9150603945916000000947
01/29/2003
Unconfirmed
00000947
9150603945916000000954
01/29/2003
Unconfirmed
00000954
Help
Delete
Download
Resend
View
Close

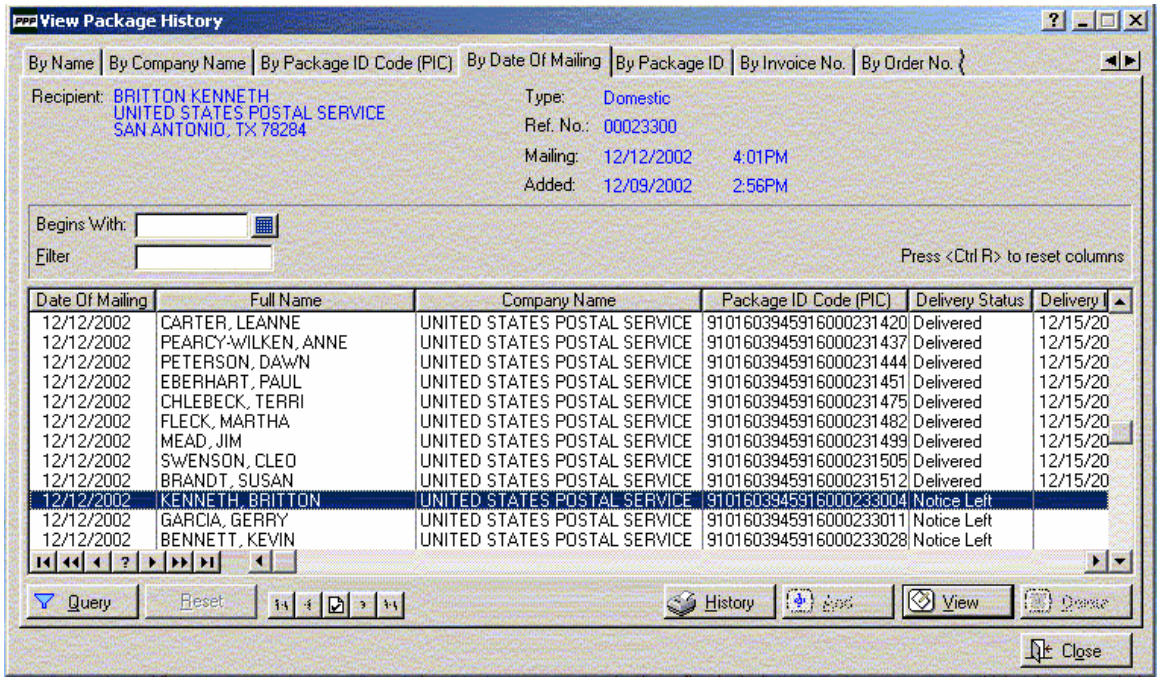
View Package History (Tracking A Package)

Once a package has been mailed, you can use Postal Package Partner to track the delivery status of that package by following these steps:

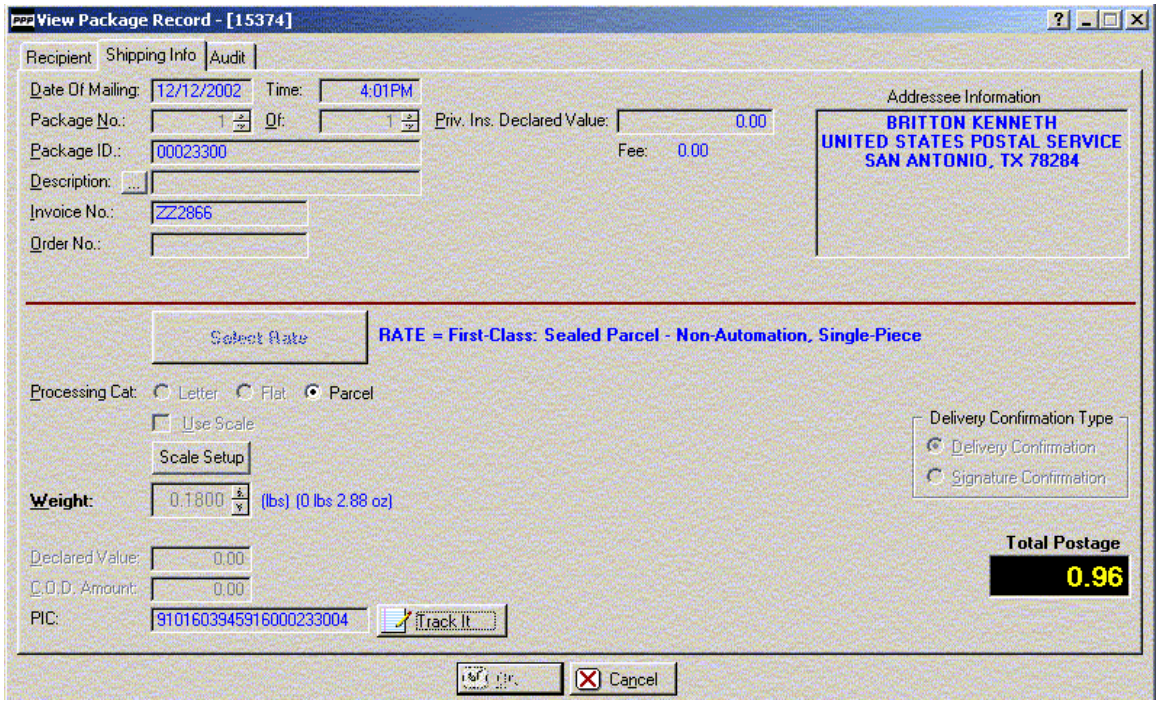
Click the View Package History button on the main Navigator screen



Identify the package you want to track; there are eight tabs across the top of the screen that organize your package history in various ways to help you locate the package you want to track.

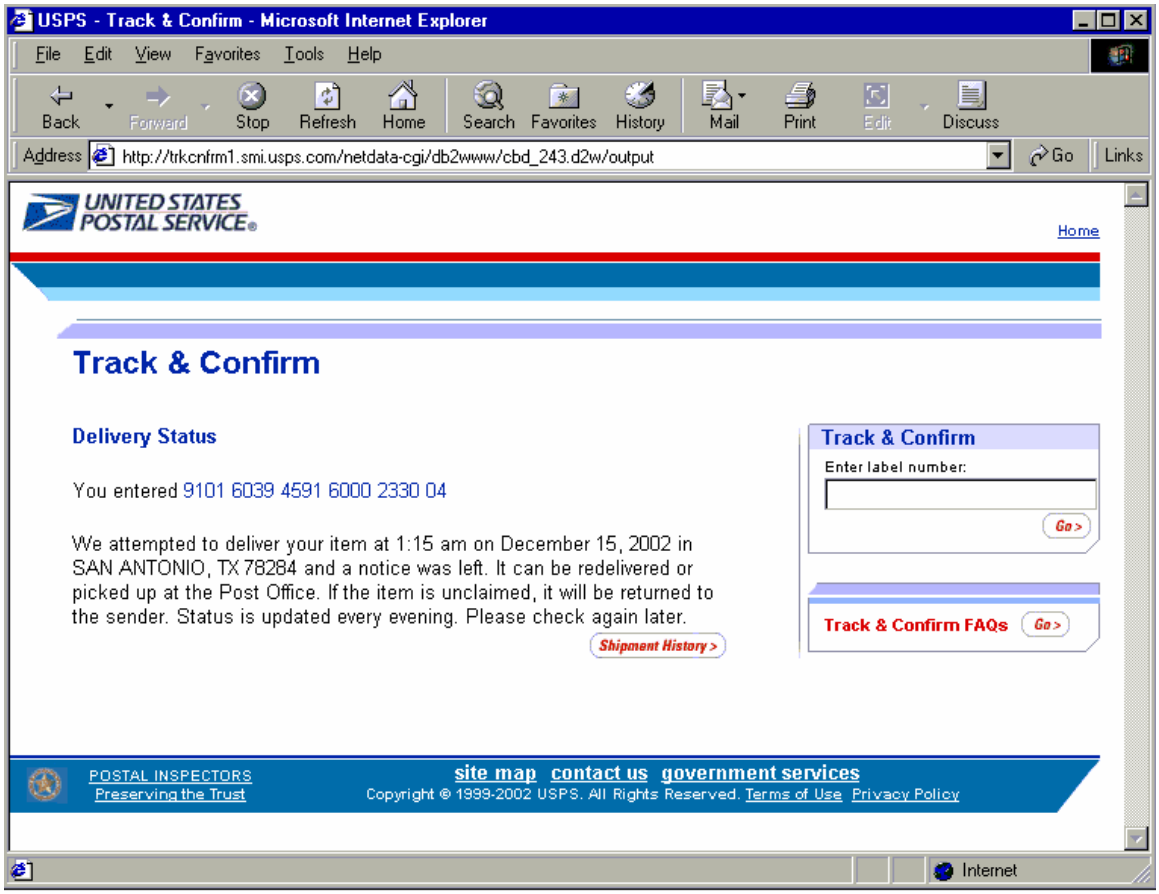

View Package History
By Name
By Company Name
By Package ID Code (PIC)
By Date Of Mailing
By Package ID
By Invoice No.
By Order No.
Recipient: BRITTON KENNETH
UNITED STATES POSTAL SERVICE
SAN ANTONIO, TX 78284
Type: Domestic
Ref. No.: 00023300
Mailing: 12/12/2002 4:01PM
Added: 12/09/2002 2:56PM
Begins With:
Filter
Press <Ctrl R> to reset columns
Date Of Mailing | Full Name | Company Name | Package ID Code (PIC) | Delivery Status | Delivery
12/12/2002 CARTER, LEANNE UNITED STATES POSTAL SERVICE 9101603945916000231420 Delivered 12/15/20
12/12/2002 PEARCY-WILKEN, ANNE UNITED STATES POSTAL SERVICE 9101603945916000231437 Delivered 12/15/20
12/12/2002 PETERSON, DAWN UNITED STATES POSTAL SERVICE 9101603945916000231444 Delivered 12/15/20
12/12/2002 EBERHART, PAUL UNITED STATES POSTAL SERVICE 9101603945916000231451 Delivered 12/15/20
12/12/2002 CHLEBECK, TERRI UNITED STATES POSTAL SERVICE 9101603945916000231475 Delivered 12/15/20
12/12/2002 FLECK, MARTHA UNITED STATES POSTAL SERVICE 9101603945916000231482 Delivered 12/15/20
12/12/2002 MEAD, JIM UNITED STATES POSTAL SERVICE 9101603945916000231499 Delivered 12/15/20
12/12/2002 SWENSON, CLEO UNITED STATES POSTAL SERVICE 9101603945916000231505 Delivered 12/15/20
12/12/2002 BRANDT, SUSAN UNITED STATES POSTAL SERVICE 9101603945916000231512 Delivered 12/15/20
12/12/2002 KENNETH, BRITTON UNITED STATES POSTAL SERVICE 9101603945916000233004 Notice Left
12/12/2002 GARCIA, GERRY UNITED STATES POSTAL SERVICE 9101603945916000233011 Notice Left
12/12/2002 BENNETT, KEVIN UNITED STATES POSTAL SERVICE 9101603945916000233028 Notice Left
Query
Reset
History
View
Close

Once you have identified the package make sure that the package is highlighted in blue, then click the View button in the lower right corner (or simply double click on the package line). Click the Shipping Info tab on the View Package Record screen Click the Track It button near the bottom of the screen



The screen that opens up will provide with the most current status of that

package from the USPS Web site


USPS - Track & Confirm - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss
Address http://trkcnfrm1.smi.usps.com/netdata-cgi/db2www/cbd_243.d2w/output
Go Links
UNITED STATES POSTAL SERVICE
Home
Track & Confirm
Delivery Status
You entered 9101 6039 4591 6000 2330 04
We attempted to deliver your item at 1:15 am on December 15, 2002 in SAN ANTONIO, TX 78284 and a notice was left. It can be redelivered or picked up at the Post Office. If the item is unclaimed, it will be returned to the sender. Status is updated every evening. Please check again later.
Shipment History >
Track & Confirm
Enter label number:
Go >
Track & Confirm FAQs Go >
POSTAL INSPECTORS
Preserving the Trust
site map contact us government services
Copyright © 1999-2002 USPS. All Rights Reserved. Terms of Use Privacy Policy
Internet

Import/Export

Import/Export Overview

Standard Import Capabilities:

Single File Import - Postal Package Partner (PPP) can import data from a fixed field length text, csv or delimited ASCII file and many dBASE, Access, Excel and Paradox files. Data can be imported directly into the Package File, which stores data on each parcel shipped, or into an Addressee/Order File, which can be used as either a customer list or order list. To import data into the Package file, you must have information on each parcel in an order. If you don't know how many parcels make up an order, you import data into the Addressee/Order file. Postal Package Partner uses this information, along with additional information entered by the user, when preparing shipments. With this option, you would import one Class of Mail or processing category at a time. You can use our query option to split up a multi-class file into separate import sessions.

Advanced Paste and Custom Paste - If the addressee information can be displayed in another application where it can be highlighted and then copied to the Windows clipboard, the Advanced Paste button can be used to parse that data into Postal Package Partner's different entry fields. If the copy operation ends up including extraneous data, we can configure a custom paste option that will extract only the data needed—call for pricing. We have already developed a custom paste for Yahoo Store owners who wish to copy directly from their Yahoo store email into Postal Package Partner.

Standard Export Capabilities:

Batch Export - You can define a text file, either fixed field length or delimited, with the fields you want and export parcel data whenever you wish. One option you have allows you to export all parcels that have been added or changed - including new tracking information - since your last export.

Package Information Logging - This feature writes a dBase IV file to a selected folder as each record is saved to disk. It creates a real-time log of all additions, changes and deletions made to the Package File. It can be used to feed another program with postage and tracking information in very close to real-time.

Advanced Connectivity Module:

This includes the Import Agent, ODBC Connect and Advanced Multi-Class Import for maximum flexibility whether you want to import data in batch mode or read external order and customer files in real-time while preparing shipments. ($500 Option)

Import Agent - This allows Postal Package Partner to monitor a specific folder for incoming files and to import these files automatically. The Import Agent can be set up for a folder on a LAN or WAN. It may also be set up for a folder on a FTP site. Once a user has defined an import template, PPP will monitor a specific folder or remote FTP Server for either the presence of a specific file, or any file. Once PPP is certain the file is not changing in size, PPP would import it automatically then move it to another folder to prevent importing it more than once. The import operation would also be moved to a background process so it can operate even when a user is working in the program, doing other things. The Import Agent is excellent for getting data from remote locations or mainframe computers or in the case of Internet Shopping Cart.

ODBC Connect: Provides Real-Time Access to an Order and/or Customer File - This option allows you to select one ODBC data source for your order file and another for your Customer File, if you wish. You would define which fields in the ODBC Data source represent the order number, name, address, city, state, zip, etc. When you go to Daily shipping, you would be able to scan or enter the order number and retrieve the order data from the ODBC data source. If your order file does not contain a shipping address, you can define the Customer File and Postal Package Partner can retrieve your order from the order file and get the shipping address information from the Customer File. This is a very clean, real-time method of interfacing to a wide variety of applications. It also has a setup option to write information to the order file to indicate an order has been processed and to provide a message if this order is retrieved again during shipment preparation. Setup options also allow the SQL syntax used to locate your order information to be optimized for the ODBC data source you are using.

Advanced Multi-Class Import - Postal Package Partner's standard import engine can only import one class of mail at a time. The Advanced Multi-Class Import option allows you to define how you are storing information for different classes of mail, different processing categories and special services. It allows you to create package records for multiple mailing classes in a single import pass.

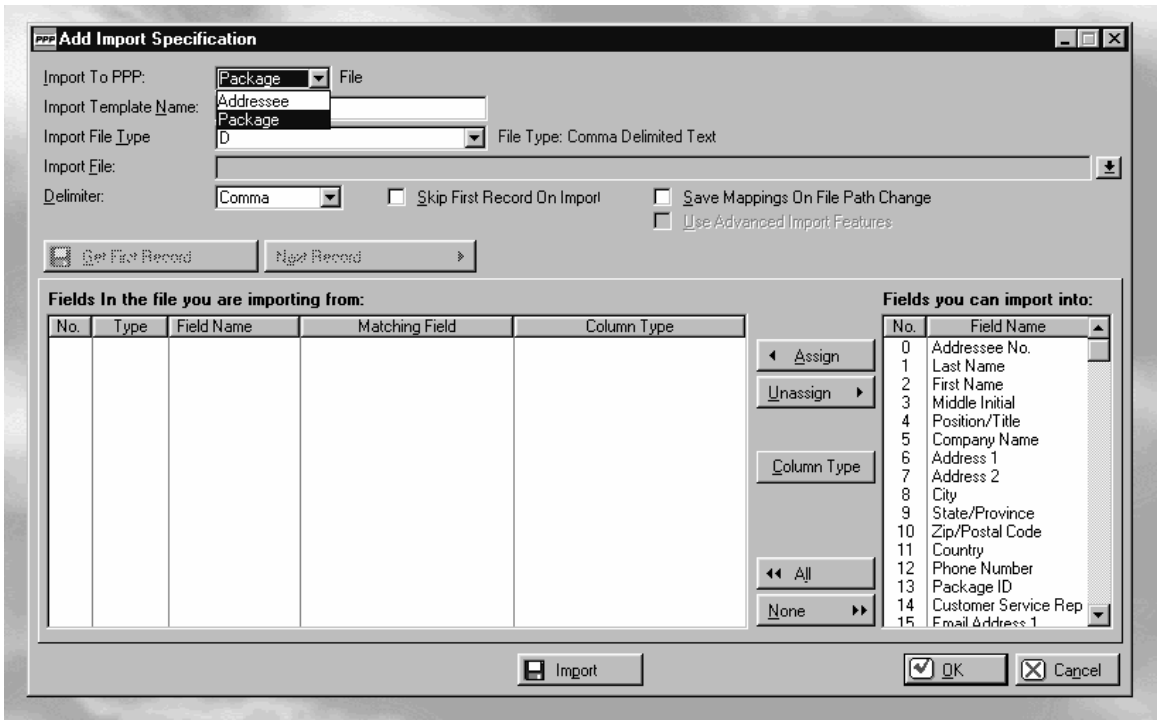
Importing Package Information Into PPP

Difference Between Package And Addressee Import

The Differences are as follows:

An **Addressee Import** will bring records into your Addressee file. You can pull up an address from this file and create a package from it at any time. If you have an order file and don't know how many parcels will be required for each order, you can also import your order file into the addressee file mapping your order number to the addressee number.

If you have a database record for each parcel you are going to ship, use the **Package Import** to create a package record for the parcel. This will show up on the "Print Labels Tab" of the "Daily Shipping" screen, so that you don't have to individually create a package from each address. You can batch print the labels or you can scan an order number from a packing slip to weigh the parcels and print the label after it is weighed.



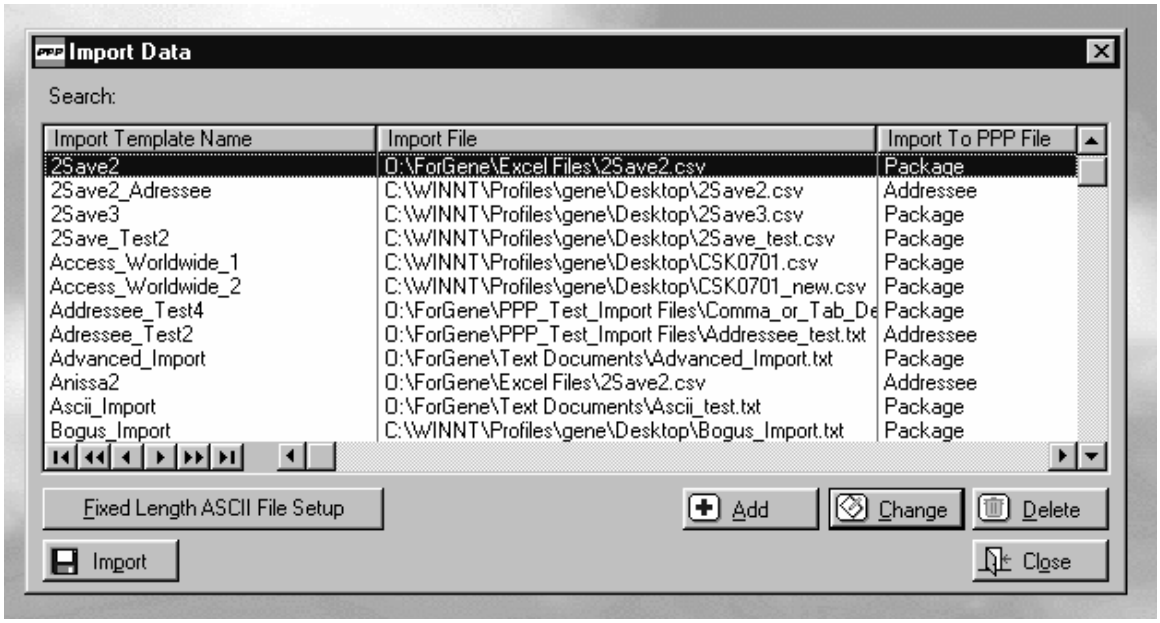
Fixed Field Length Import

Overview of the Process

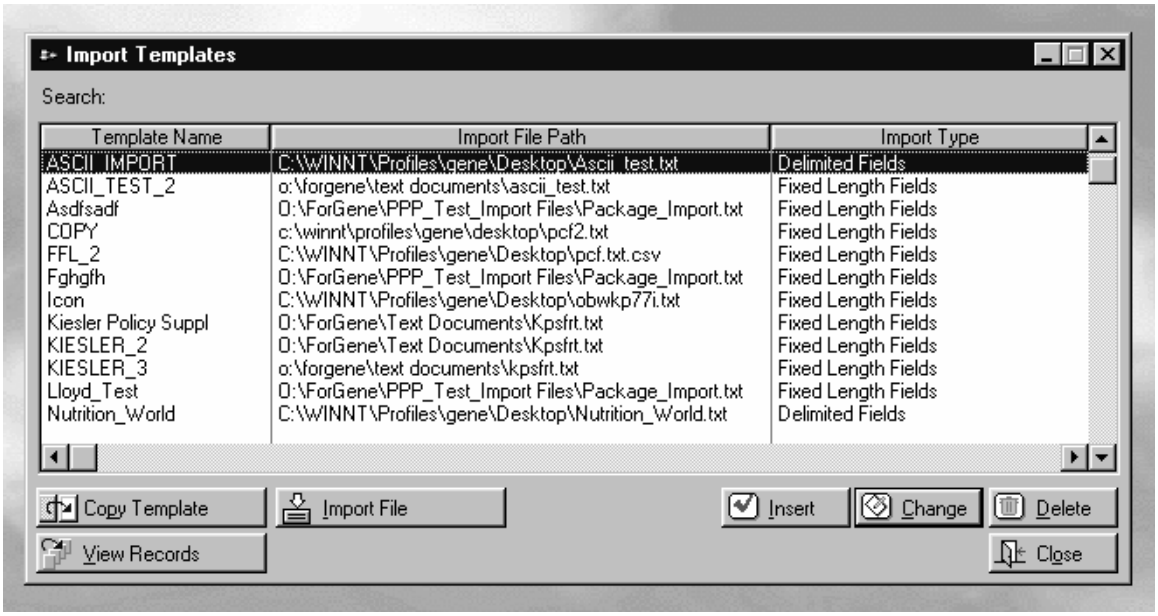
Unlike importing other file types available in the import program, importing fixed field length ASCII files is a two-step process. The first step converts the fixed field length file into a comma-delimited file. The second step converts the comma-delimited file into Postal Package Partner files. Though this is a two-step process, once it is set up, it is executed as a single import step. It does involve two different setups: one to define the fixed field length file into discrete fields we can map and the second step would be mapping those fields to Postal Package Partner fields.

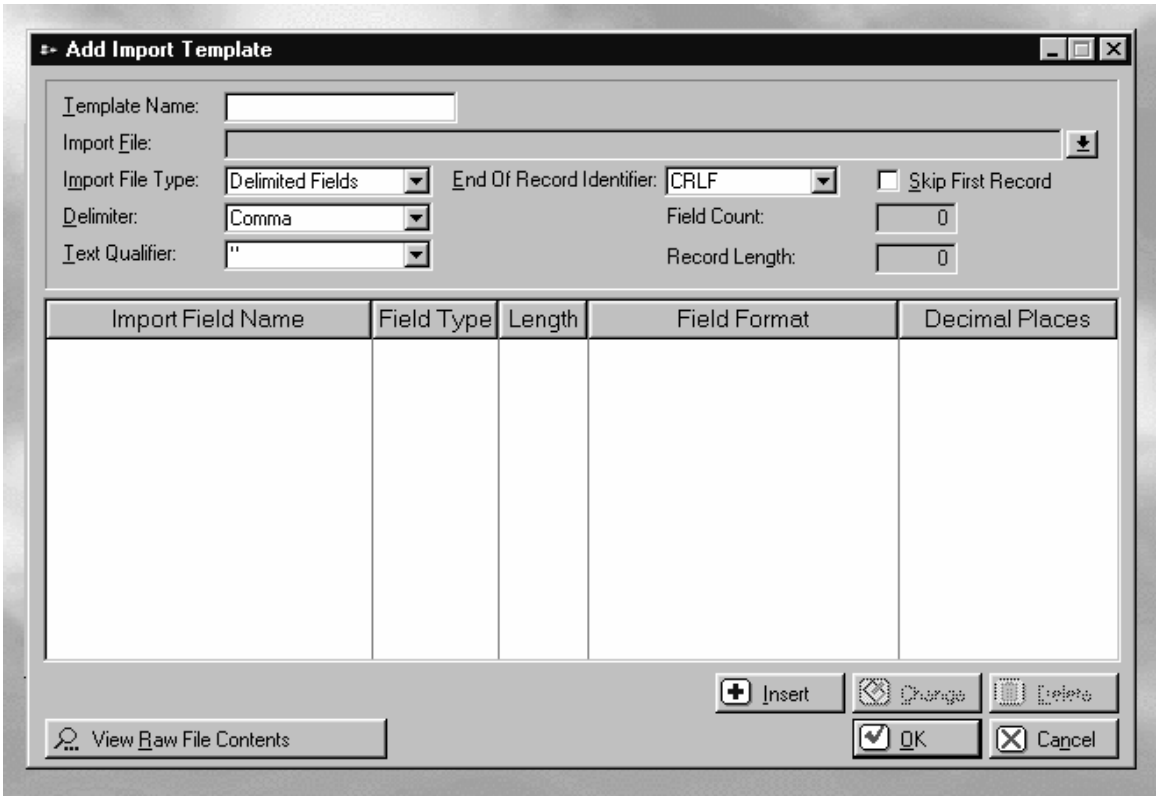
Step One: Defining the Fixed Field Length File

Click on "Import Data" then press the Fixed Length File Setup button on the Import Data browse that lists your Fixed Field Length file import templates.



Press the Insert button to create a new definition.





Template Name: Enter the name of the template you are creating

Import File: Select the file you are importing by pressing the button at the right of the entry field.

Import File Type: Select Fixed Field Length

End of Record Identifier: Enter what characters are used at the end of each record. Choices include CR (Carriage return), LF (Line Feed), LF +CR, CR+LF, and None (one continuous line of data is present with no characters in between each record.

Skip First Record: If the first record includes the field names, you should check this checkbox. Press the 'View Raw File Contents' button to see if field names are displayed. If so, check this checkbox.

If you have a documented layout you should press the Insert button and add your first field definition:

Import Field Name: Enter the name of the field keep it short but descriptive. You will be using it later for mapping fields into Postal Package Partner.

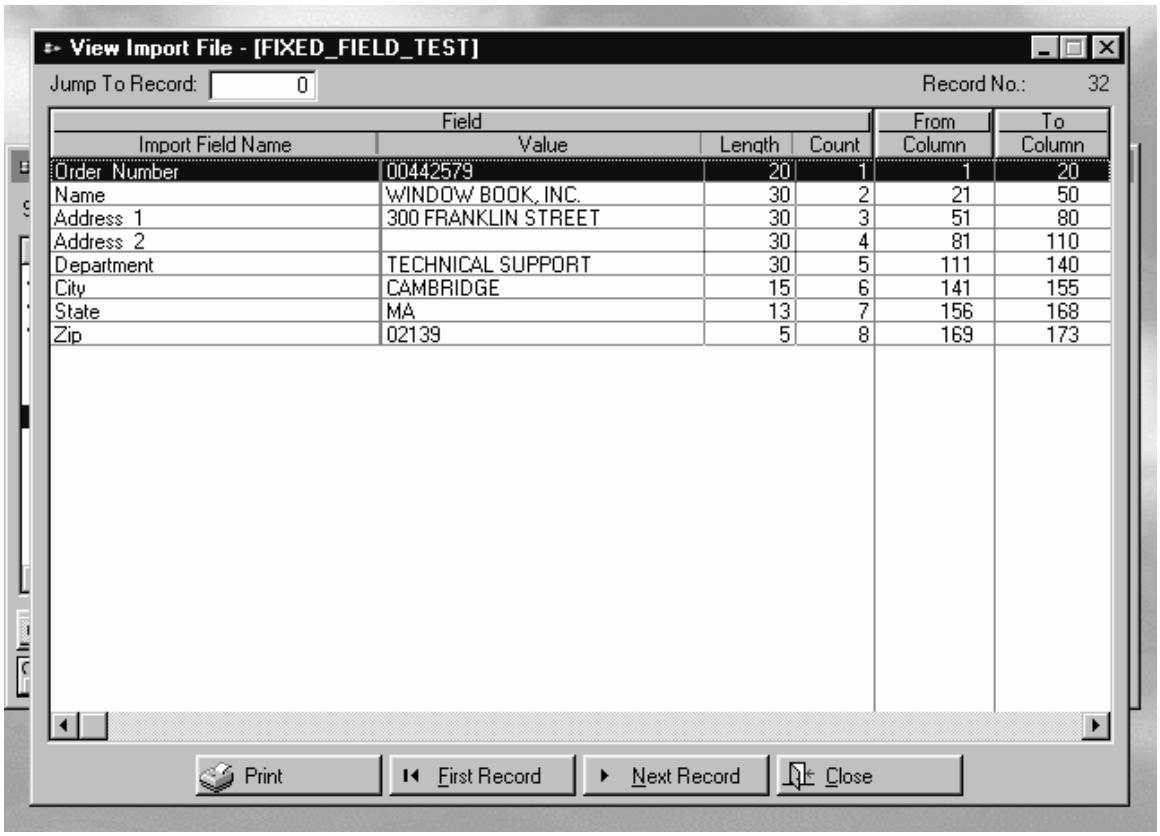
Field Type: A String is any alphanumeric information that has no decimal points. A Number is an all-numeric value that may include an actual or 'implied' decimal point. A Date is a date.

Length: The total length of this field.

Field Format: If the field is a number, you need to select 'No Decimal' if the number will always be an integer without any decimal places, 'Has Decimal' if there is already a decimal point in the data or 'Implied Decimal' if we need to insert a decimal point into the data during import. For example, you may have a 7-character field but the last two digits represents cents in a dollar amount. You would set the decimal places to 2. We would format the number as NNNNN.NN when importing. If you have selected a date, you have a variety of date formats to pick from to match up the format of the date you are importing.

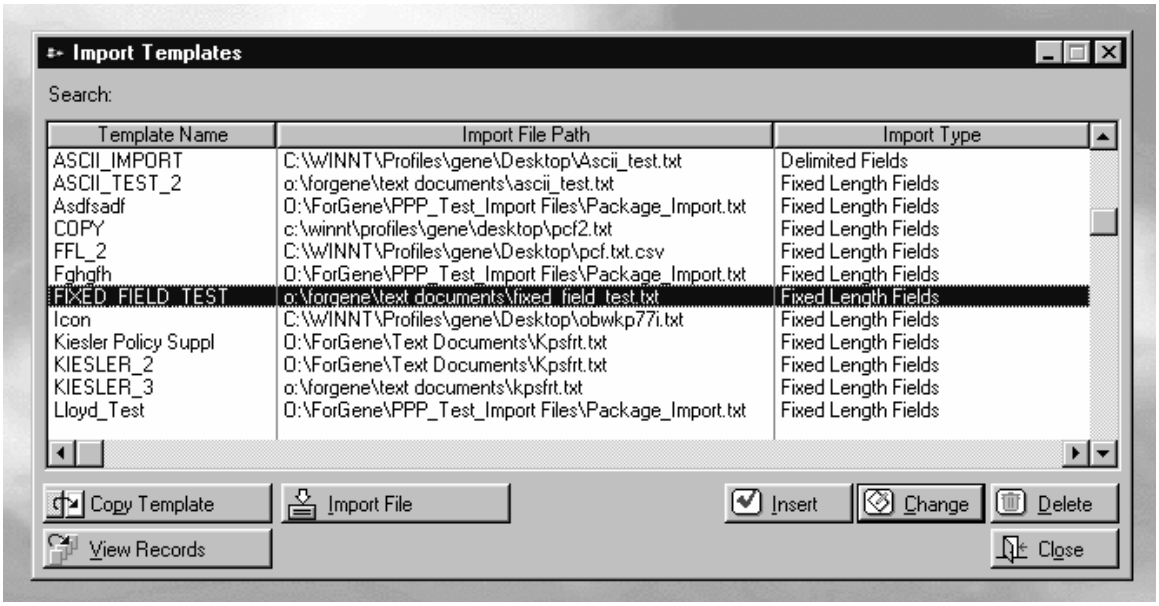
You should enter the information for each field by pressing TAB when you are done with each entry. After you are done with one line, the next line will be inserted automatically without having to press the INSERT Key. You can see a running total of the number of fields and total record length at the top of the screen as you go. When you are done entering press the ESCAPE key to end entry. You can re-arrange fields at any point using the MOVE buttons. If you forgot a field and press the INSERT key to add it, it will be placed at the bottom and you must use the MOVE UP button to move it into the correct position.

When you are done you should check your work by pressing the VIEW RECORDS button, which will show you the first record parsed out. This should match your specification:



You should press the NEXT Record button to see if the 2nd record is parsed correctly. This will tell you if your end of record identifier is set correctly. If the 2nd record is offset by one or two characters or does not appear at all, your end of record terminator is incorrect.

When you are all done press the IMPORT FILE button on the Import Template screen below.



Step Two: Mapping the Import Fields to Postal Package Partner

Go to back to the "Import Data" screen and press the ADD button to add a new Import Definition. **ENTER THE SAME NAME FOR THIS DEFINITION AS YOU USED FOR THE TEMPLATE NAME IN STEP ONE!!!** This is critical since this is how the import program knows to convert the Fixed Field Length File before doing the import. Enter an Import Template Name for the definition then press the SET IMPORT TYPE button and enter "D" for delimited in the File Type Field then press DONE. The import file will be found in the same folder your fixed field length file was in only it will now have a 'CSV' extension. To select it, press the lookup button to the right of the Import File field, change the file type to ALL, then change the folder to the one where the original ASCII file was and select the CSV version of the file. You should check the "Skip First Record" checkbox and select a the Delimited file type the select Comma s the delimiter.

At this point you can map the fields just like you would for any other comma-delimited file.

Click OK whenever the fields are mapped. You can now do your import whenever you want.

The program will first convert your fixed field length ASCII file to Comma Delimited then import the Comma Delimited file into Postal Package Partner.

Single File Import

Postal Package Partner can import data from other programs that can generate files to reflect what needs to be shipped. The import program can read a number of popular file formats and the optional Advanced Connectivity Module provides automated importing from files placed on a network drive or remote FTP site and multi-class/multi-special services importing.

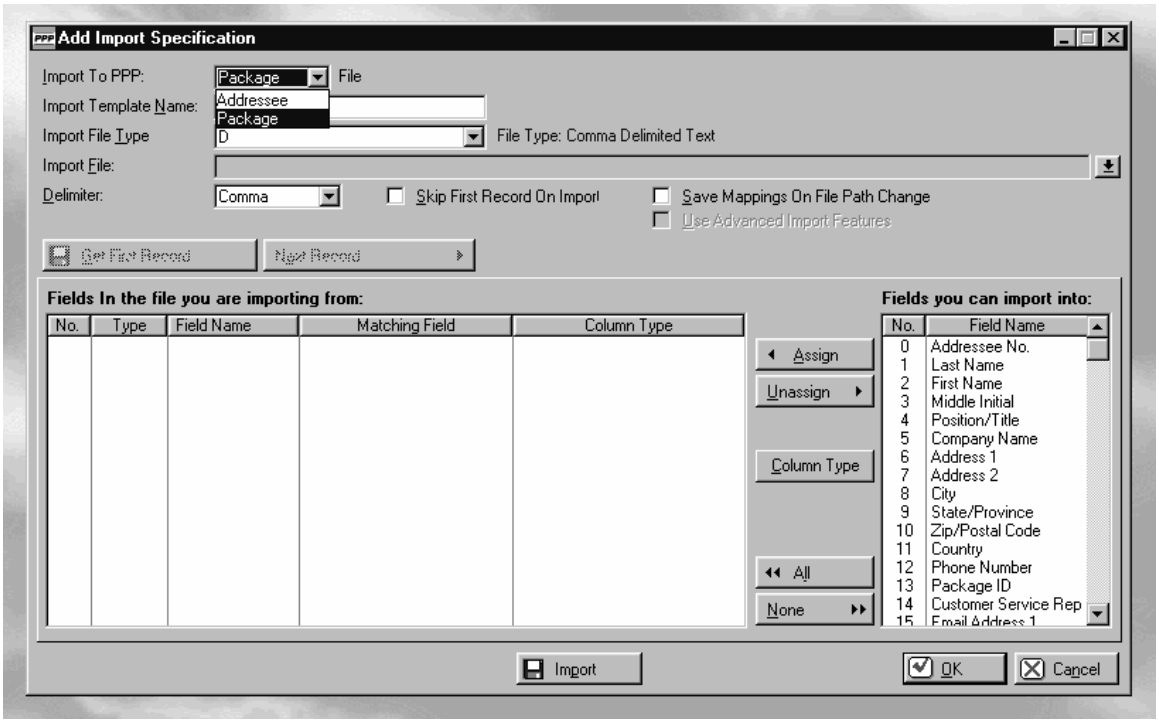
Postal Package Partner can do two types of Imports to handle three different import requirements

Which one is best for you?

Package Imports. If you can generate a file that will have a record for each package, the package import will create the shipping records for each parcel. To do this successfully you must know how many parcels will make up each shipment or ship one parcel per shipment all the time.

Addressee Imports: The Addressee file in Postal Package Partner can be used as either an address book or order file. This means that importing into the Addressee file can serve one of two purposes:

Order Imports. If you are using Postal Package Partner to fill orders and do not know how may packages it will take to fill an order, you can import your order information into our "Addressee" file. Your order number would be mapped to the addressee number. **Address Book Imports.** If you need to be able to do shipments and draw your information from a address book to reduce data entry, you can import data from an address database and even keep it in synch by defining the unique customer ID in the field mappings. This will allow the import process to add new addresses and update existing addresses. Creating an Import Definition You can create many different import definitions to import different types of files you may need to import. You must first select the Import / Export option from the Navigator Menu or the Import Data option from the File Menu. You will get a list of the import definitions that have already been created. Press the Add button to create a new definition.



Import to PPP: You must first select which of the two files you want to add your imported records to. If you are doing a package import where each record represents a package to be shipped, select 'Package'. If you are importing orders or address book records, choose the 'Addressee' file option.

Import Template Name: Enter a name for this Import Definition, which also referred to as an import template.

Import File Type: Press the Lookup button on the right to get list of available file types. Currently you can select Access, dBase, ASCII Fixed Field Length, Microsoft Excel, ASCII Delimited, Quattro Pro, Symphony, Lotus 1-2, or Lotus 3-5. If the file you are trying to access is not on this list you may consider looking at the Advanced Connectivity Module which has a feature called ODBC Connect which gives you real-time access to any file(s) supported by ODBC from inside Postal Package Partner without importing.

Import File Name: Select the file you wish to import by pressing the lookup button to the right of the File Name Field. You will get a Windows file selection dialog that will look for files with the most common file extensions for the file type selected. Select the file. If the file type you selected supports multiple tables within the file, you must next select the table you wish to import:

Save Mappings on File Path Change: After you select file name and table (if necessary), check this checkbox. It will allow you change the file path and file name without losing your field mappings.

Delimiter: If you have selected ASCII Delimited as your file type, you must next choose what the field delimiter is for the file. Your choices include Comma or Tab.

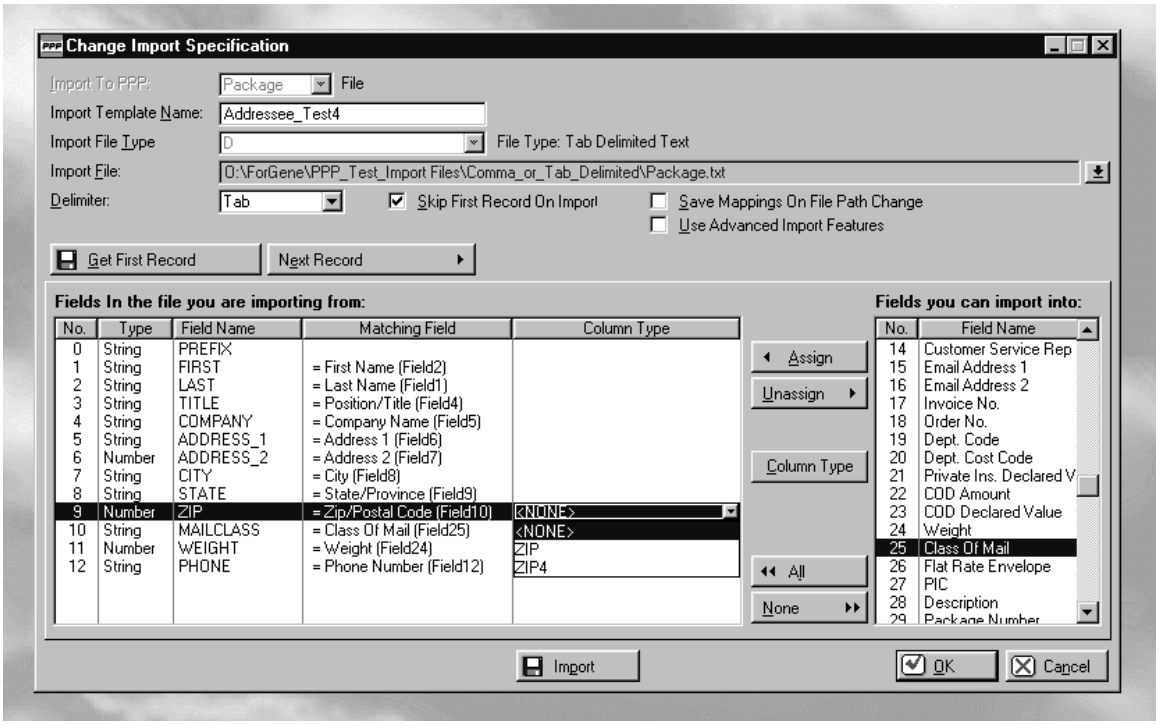
Skip First Record on Import. If the first record of the file includes field names, you would want to check this checkbox so you don't import field names into your file. Certain types of files will display field names on the left column of the definition screen from a file header record that would not be imported if you do not check this checkbox. Typically you will check this box if you see field names appear when mapping ASCII fixed field length or delimited files. You must be careful not to check this unnecessarily or you will skip the first record of the file that could have data in it you want to import.

Use Advanced Import Features. If you have purchased the Advanced Connectivity Module you will have the option to check this checkbox if you want to import package records that are of different mail classes and may use different Special Services like Registered Mail, Insurance, COD, etc. See the instructions later in this document if you area interested in using these features.

Mapping Fields. The list of Postal Package Partner fields that can be mapped to your import data appear on the right side of the screen. They will be different depending on whether you are importing data into the Package or Addressee file. **Before you start mapping your fields, make sure the Import to PPP setting (Package or Addressee) is set correctly. If you change your mind, your mappings will be cleared and you will have to start the mapping process over again.**

To map a field you highlight the field you want to map in the import file listed on the left, the highlight the corresponding Postal Package Partner field on the right, then press the Assign button. The PPP field name will appear on the left next to the import file field.

You MUST map and have data in either the Company Name or Last Name fields in order for the data to import. You should also map the city, state and ZIP as well. If you change your mind about a mapping you did, you can 'unassign' a mapping using the Unassign button. If you are importing from a text file with out any field names listed in the first record, you can press the NEXT record button to view the contents of the file so you an see which field is which. If there area field names in the first record, you should check the "Skip First Record on Import" checkbox so that the field names are not imported as an address.



Column Type: In the **Advanced Multi-Class Import**, the column type is used to map a number of special fields. In the regular import, it can also be used to handle concatenation of a ZIP code field that would hold a five digit ZIP and a ZIP+4 field that would hold the last four digits of the ZIP code.

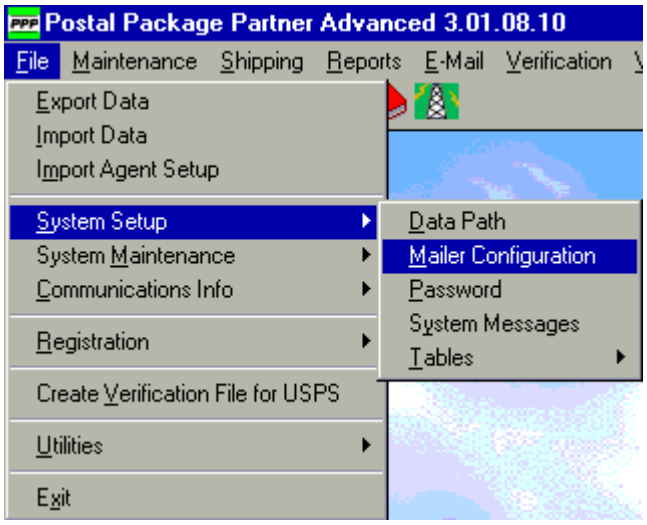
You do not need to map the regular ZIP/Postal Code field on the right. Instead, highlight the ZIP record on the left, press the Column Type button and select ZIP from the pull down menu. Next highlight the ZIP+4 field and select ZIP+4 as the type after pressing the Column Type button. Instead of pressing the Column Type button you can also double click on the column type field with your mouse to get the pull down menu. When the data is imported, the two fields will be 'concatenated' (stuck together) with a dash in-between.

At this point you can press the OK button to save your definition.

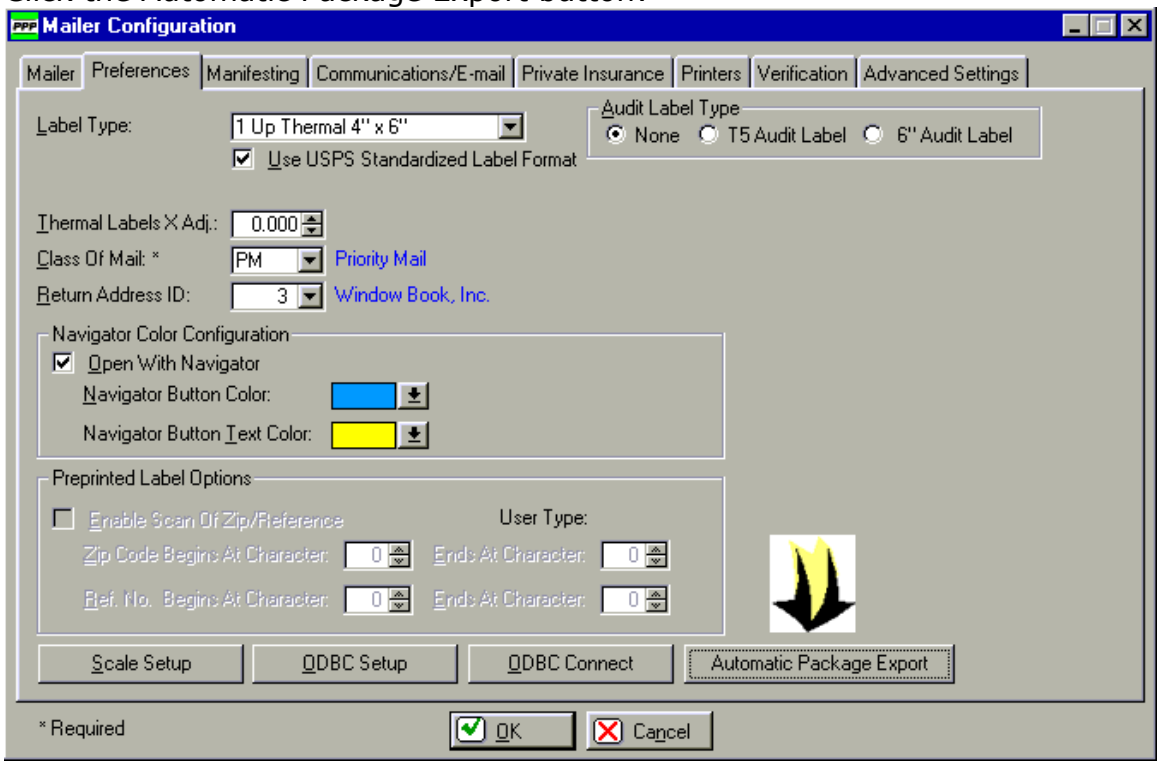
Exporting Package Information Out Of PPP

Automatic Package Export

To set up Automatic Package Export complete the following steps:
(**Note:** these instructions are for creating a standard comma-delimited output file -- other export file formats are also allowed).
Click on File => System Setup => Mailer Configuration, then go to the Preferences tab:

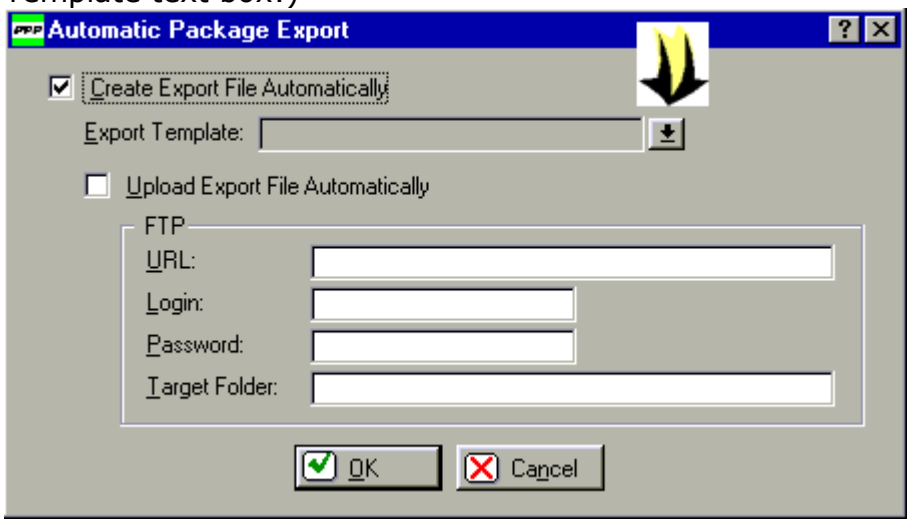


Click the Automatic Package Export button:

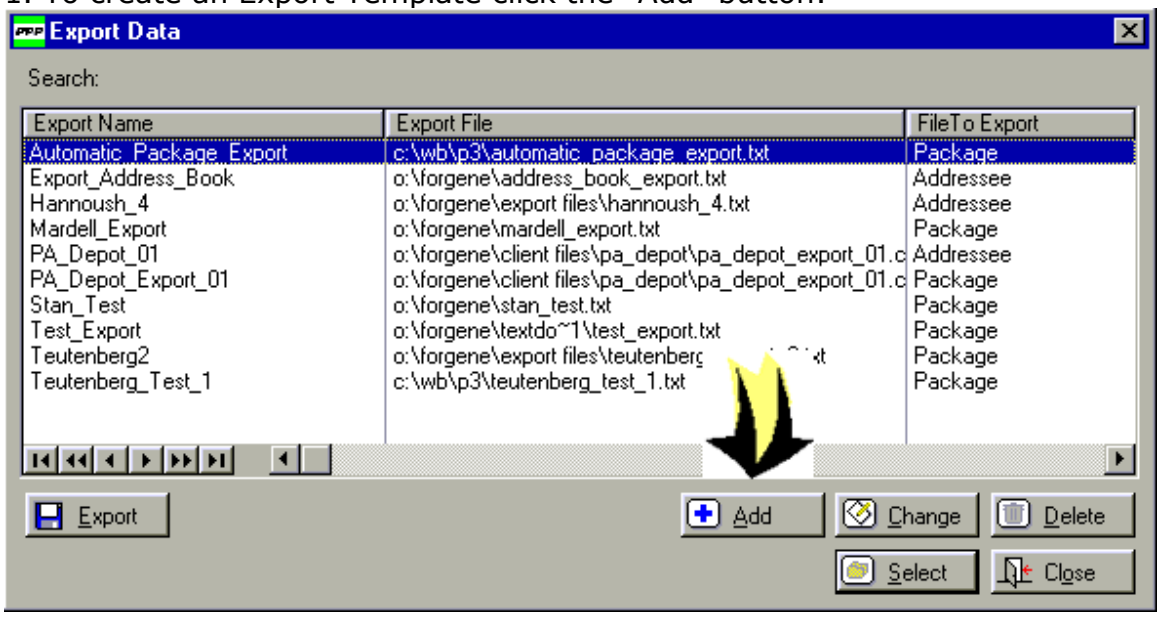


Check "Create Export File Automatically"

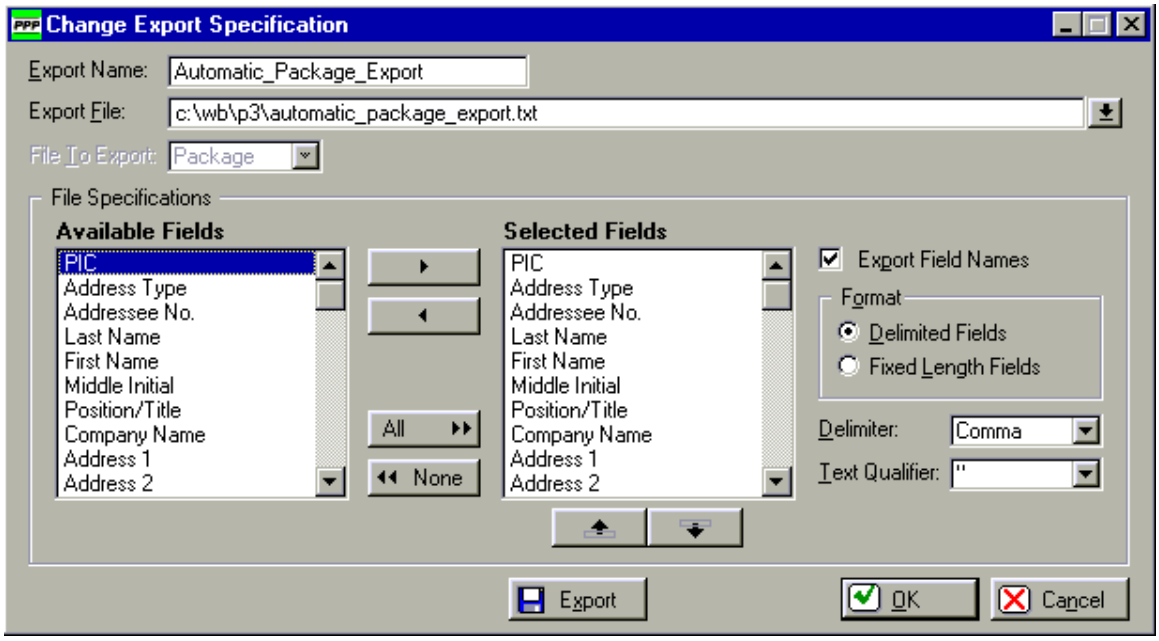
Click the button for the drop down menu (located to the right of the Export Template text box:)



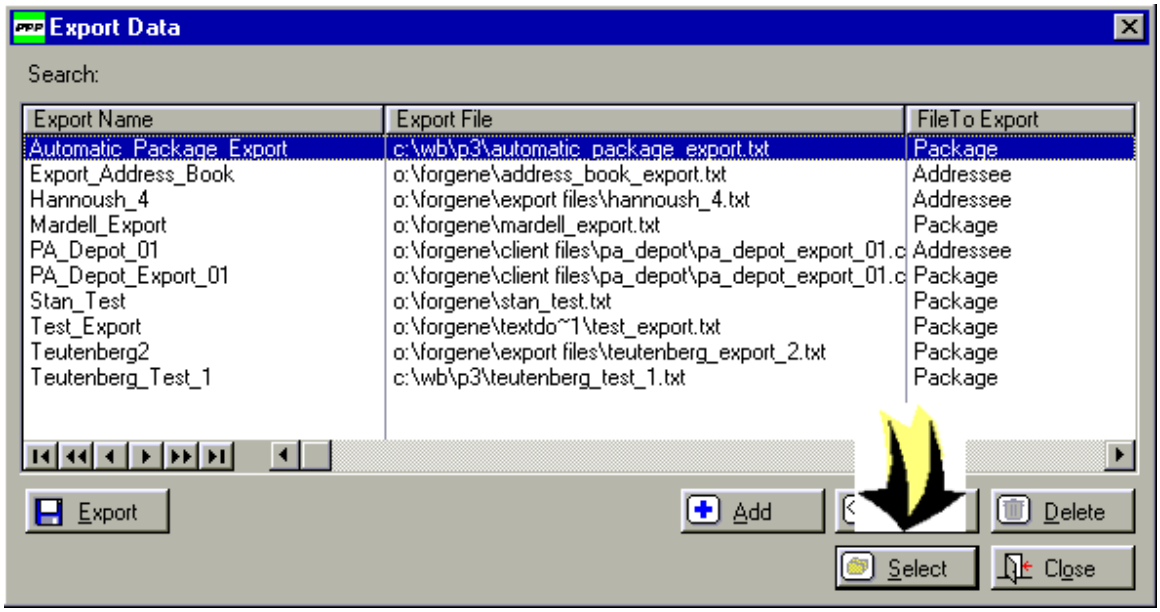
1. To create an Export Template click the "Add" button:



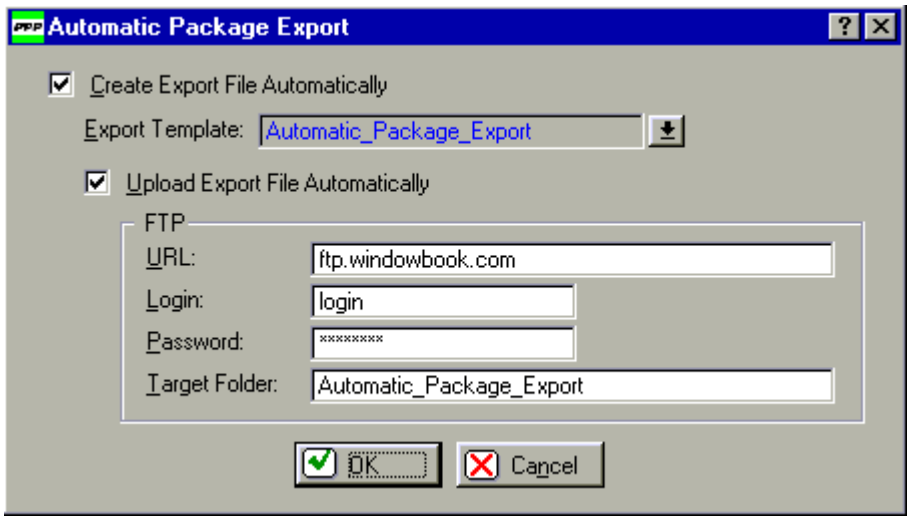
a. Type in a name for "Export Name"
b. Choose the file folder you want to save the export to and create a file name ending in ".txt."
c. Pick "Package" under "File to Export"
d. Identify and choose the data fields you want to export
e. Check the "Export Field Names" checkbox
f. Check the "Delimited Fields" radio button
g. Set Delimiter to "Comma"
h. Set "Text Qualifier" to Double Quote (")
i. Click the "OK" button to save the template



j. Highlight the Export Template you just created and click the "Select" button:



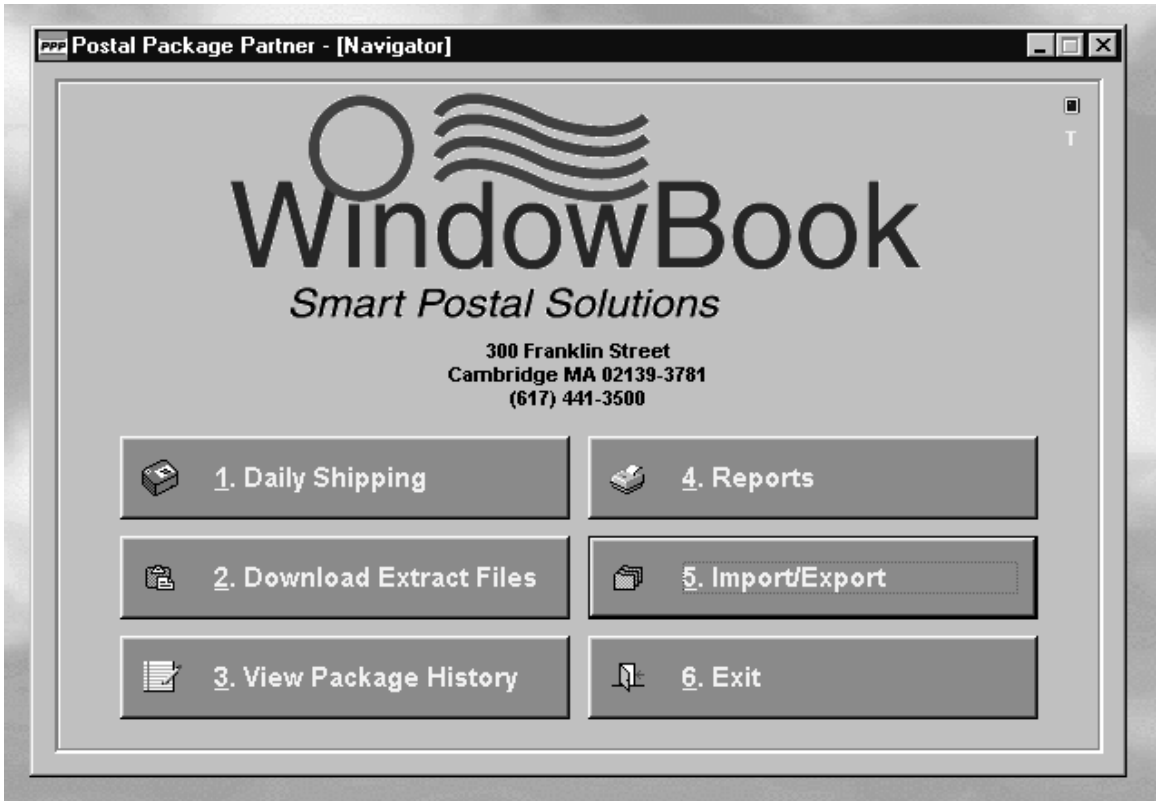
k. Complete the remaining FTP information.



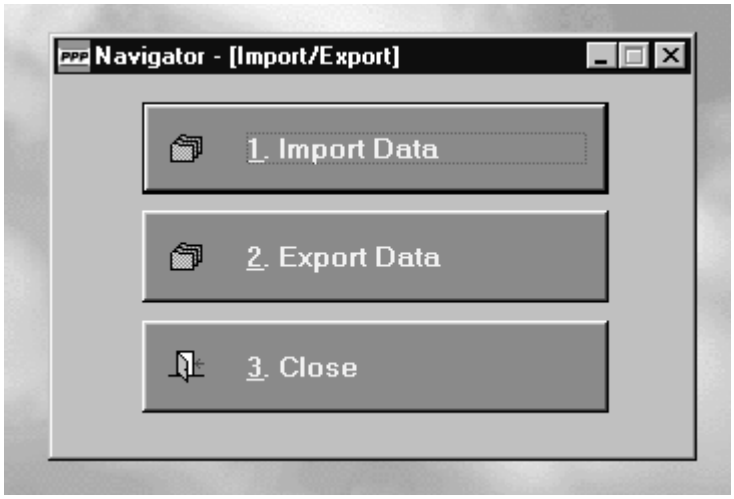
l. Check "Upload Export File Automatically". This will cause the file to be uploaded when Delivery Confirmation data is uploaded to the Post Office server.

Batch Export

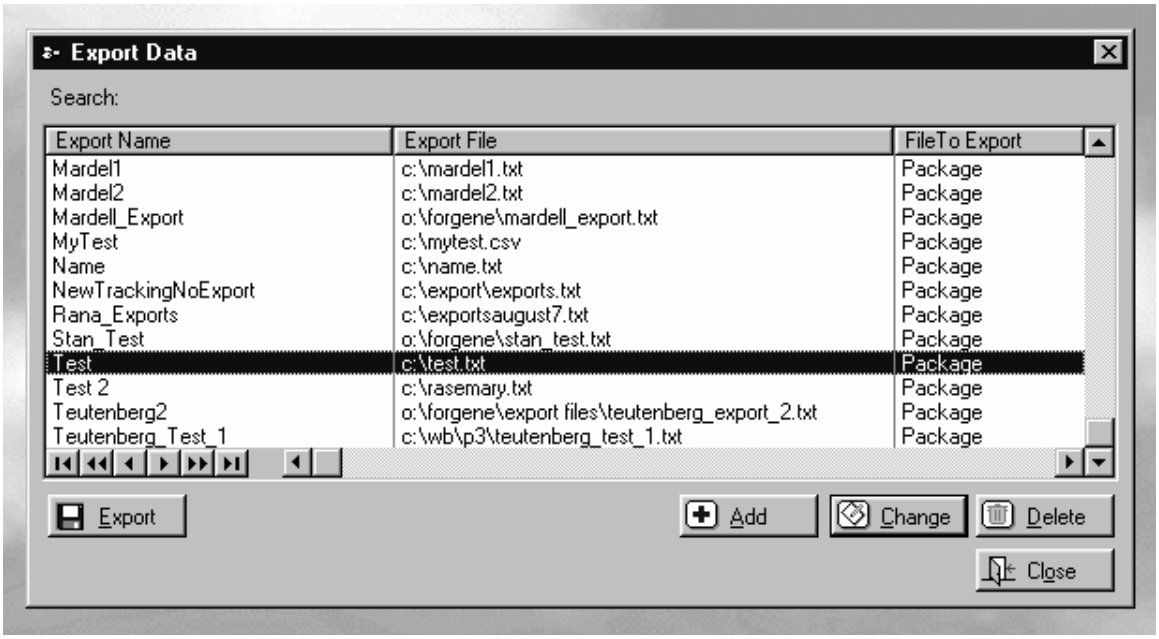
Click the Import/Export button on the main Navigator window



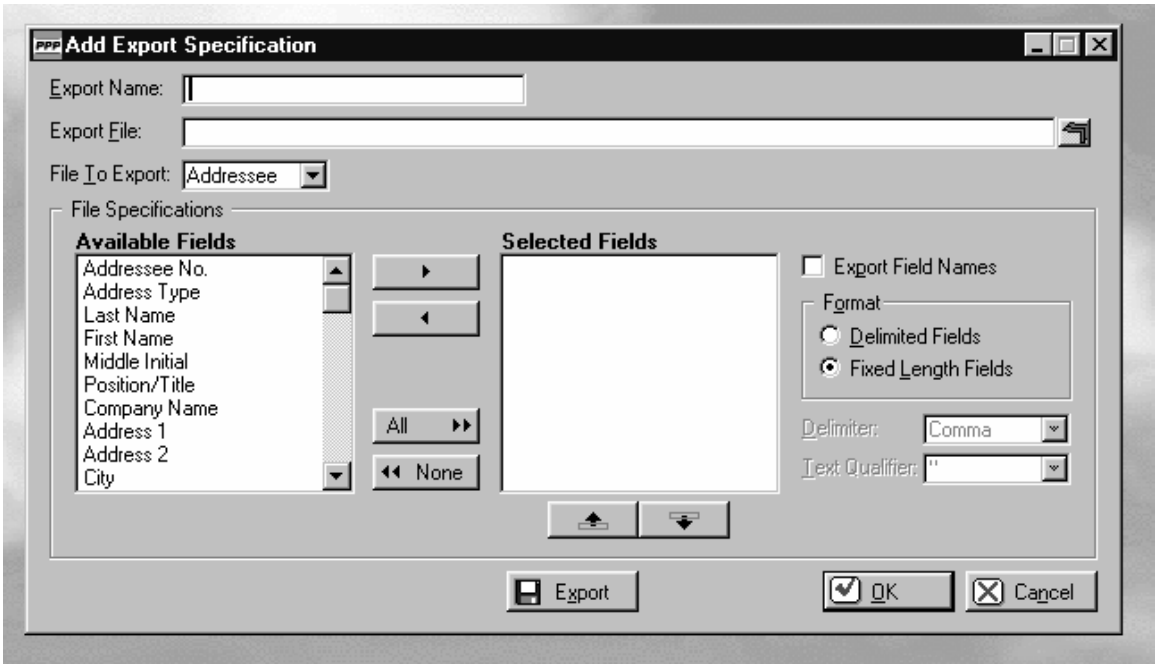
Click the Export Data button



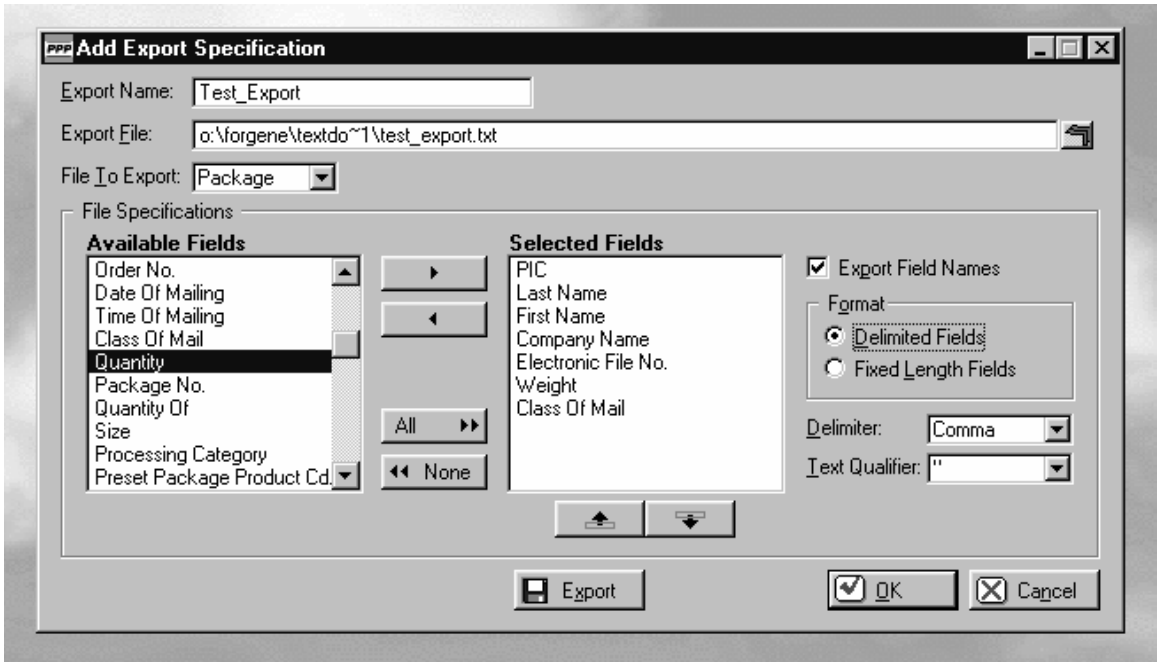
Click the Add button on the Export Data screen



Type in a name of your choosing for Export Name



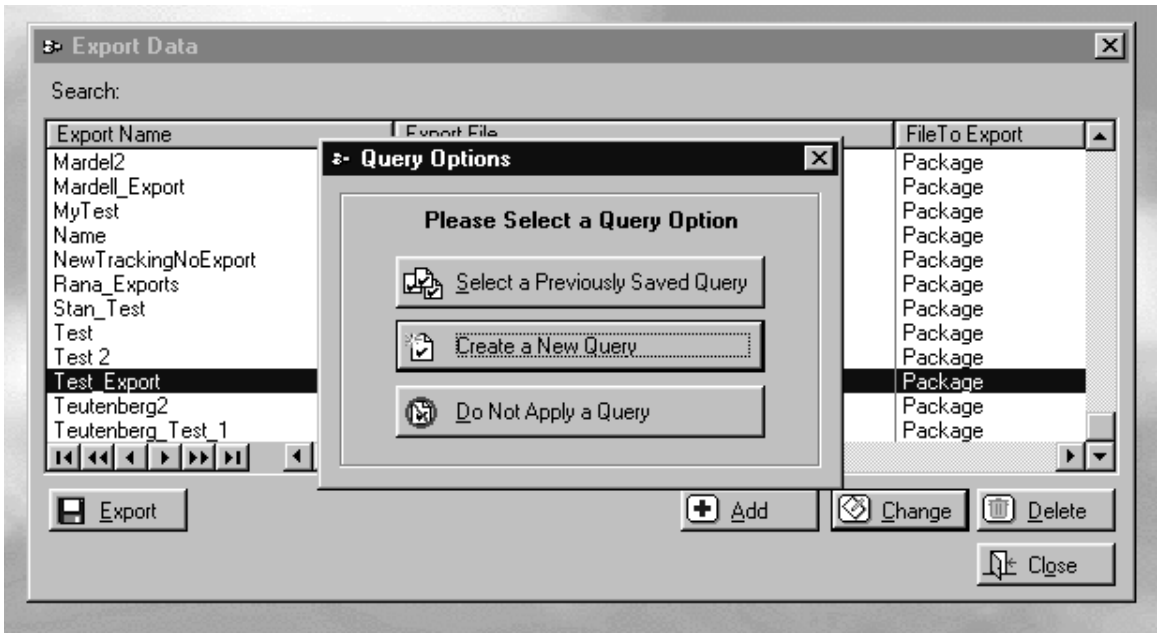
Click the file button to the right of the Export File text box Identify the file folder you want to save the export to and create a file name ending in ".txt." Identify the File to Export as either Addressee or Package (usually use Package to export package-related information such as PIC number) Identify the Selected Fields you want to export Check the Export Field Names checkbox Check the Delimited Fields radio button Set Delimiter to Comma Set Text Qualifier to Double Quote (")



Click the OK button

Click the Export button from the Export Data screen Click No at the Export Package Records screen

Click the Create a Query button



Create a query that states "PKG:Date of Mailing is equal to 08/01/2002" (or whatever date you want to use)

Click the Finish button and do not save the query, since you'll need to recreate it each day.

Processing Record should begin.

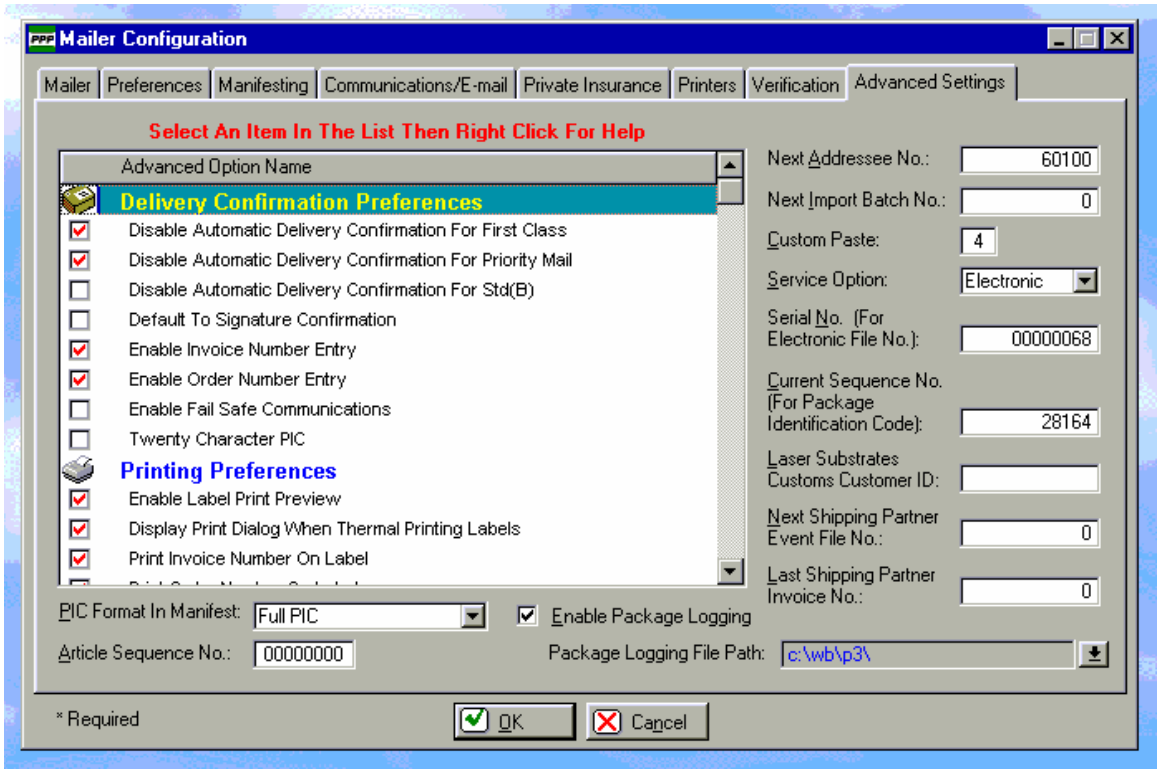
Once complete use Windows Explorer (My Computer) to locate the file you just created and confirm that all of the data is accurate.

Package Information Logging

Export Log Feature:
One of the most popular features offered by some shipping software products is the ability to create a real-time log file of all packages shipped. This allows them to import this file periodically into their system using a 'daemon' so the information can be updated in close to real time. They would typically rename then import the file which forces us to create a new file the next time we create a log record.

Because multiple workstations could be adding data to this file, we must be open the file in a shared mode which makes using a text file out of the question. Instead, we are creating a dBase III file which is almost universally readable. When a record is saved, changed or deleted from our package file, we will add a record to the end of the log file.Mailer Configuration:

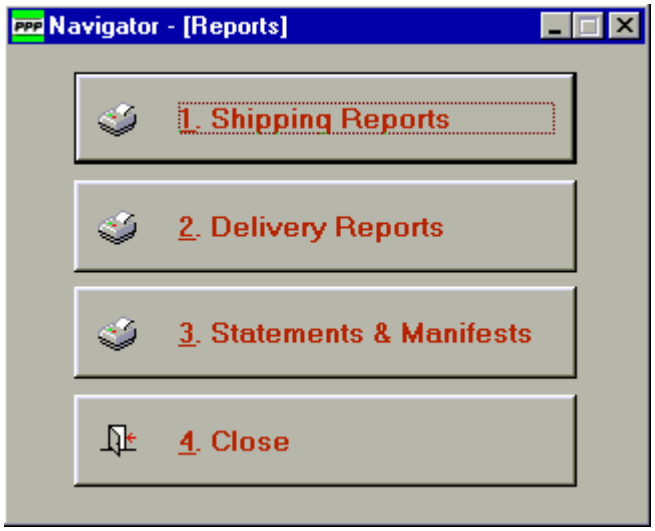
To turn on the feature go to Mailer Configuration, select Advanced Setup and check the "Enable Package Logging" checkbox to turn on the feature. Under the checkbox is a lookup button that allows you to select the path where the file will be generated. Select a path. The file name is PPPShips.DBF.



Reports

Reports Overview

You can review two types of Reports in Postal Package Partner -- Shipping Reports and Delivery Reports. Both reports can be accessed through the main Navigator window and clicking the Reports button. You can then select either Shipping Reports or Delivery Reports from the next screen (as well as, Statements and Manifests).



Shipping Reports

Customer Statistics Report -- This report allows you to select a date range then get a summary of the items sorted and totaled by addressee (company name). It shows the number of parcels, average declared value and total value for the period. It also shows the date of the last shipment.

Departmental Accounting -- This report summarizes and sorts your shipments by department and departmental cost code for any date for any date range you specify. This report is used if you have Departmental Accounting enabled and provides a convenient way of doing departmental charge backs in a corporate or institutional setting.

End of Day -- This report can be sorted by PIC, Service type (Priority, Parcel Post, etc.) and PIC, Date of Mailing, Name, and Company Name. Check the "Print Special Services Detail" to see detailed information on each special service provided for each parcel.

Express Mail Reports Manifest -- This report must be printed each day if you are doing Electronic Express Mail Manifesting (not currently available in Postal Package Partner Gold) and submitted with your mailings along with your form 3152-E. It does NOT include any Express Mail Military Service parcels shipped using the four-part preprinted labels.

Daily -- This report shows all of your Express Mail for a given date including Express Mail Military Service and Electronic Mail Manifest transactions.

Summary -- This report gives you a summary of all Express Mail transactions that is designed to correspond with your Express Mail Corporate Account Statement. It can be helpful for reconciling postage amounts.

Usage -- This report is highly useful whenever you need to analyze what happened in a date range of your Express Mail Shipping. It shows you essential information, like: PIC number, Origin, Destination Zip, Postage, Fees, etc.

History -- This report is similar to the End of Day Report except that the user specifies a date range instead of a single date.

Private Insurance -- This report provides a remittance statement for the parcels that were privately insured. You must have Private Insurance enabled in the Mailer Configuration.

Return Addressee Summary -- If you are using multiple return addresses, this report will provide you a summary of all of your mailings for each return addressee between two mailing dates of your choice.

Shipping by Preset -- If you are using predetermined package weights and have presets enabled, you will get a shipping activity report sorted and subtotaled by preset.

Shipping for Date -- This report is similar to the History Report but can use a "Query by Example" feature to choose the items that are displayed in the report. These queries can be saved and run any time.

Unshipped Parcels -- This report shows parcels that you may have entered or imported for a future date but not yet shipped.

Priority and Express Mail Usage Summary -- This report will list the number of packages sent via Priority Mail and Express Mail for a requested range of dates.

Delivery Reports

Unscanned Items -- This report lists, for any date range, all items that have not been delivered.

Unscanned Analysis -- This report is similar to the delivery analysis report but shows you how the unscanned items are broken out so you may be able to determine a pattern. Such a pattern may emerge if a particular post office does not follow scanning procedures properly, though this is extremely rare these days.

Delivered Items -- This report lists, for any date range, all items that have been delivered.

Delivery Analysis -- This report can be printed by zone, state, or 3-digit ZIP. It shows how long it took in business days (less Sundays and Holidays) to deliver the mail. It helps you spot delivery problems quickly and adjust your shipping practices accordingly.

Spreadsheet Wizard

The Spreadsheet Wizard is used to create Custom Reports, using any fields from your Package Table.

E-Mail Notification

Communication / E-Mail

Communicating information back and forth with the USPS Web Server and sending out e-mail communications to your customers about the status of their deliveries are two important components of the Postal Package Partner System.

The Communications section focuses on common issues concerning transfer of data through the Internet. Some of the topics include the following:

Communicating information to the USPS server
Diagnosing errors that may occur when attempting to communicate
Resolving issues related to unconfirmed Electronic File Numbers (EFNs)

The E-mail section focuses on common issues related to the communication of information between you and your customers. Some of the topics include the following:

Customizing e-mail messages
Diagnosing why e-mails might not be sent
E-mails related to Yahoo and AOL accounts

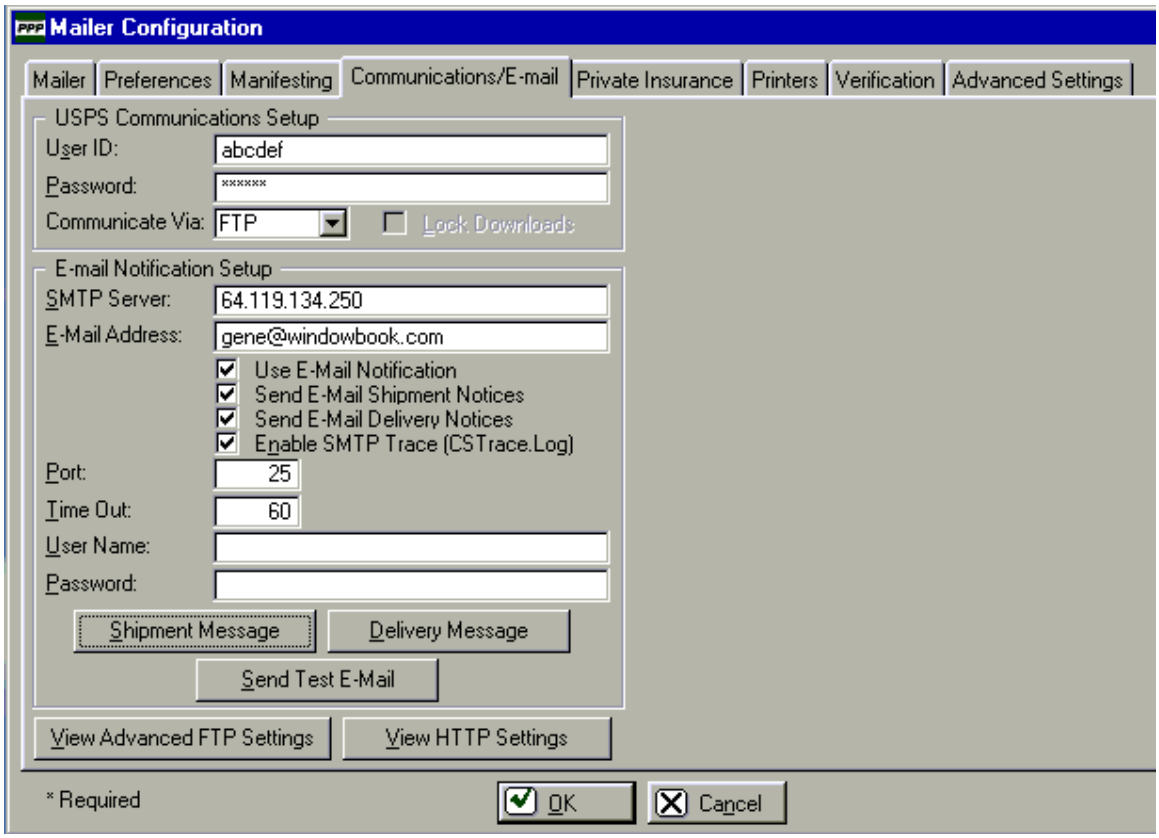
New E-mail features

Customizing E-Mails

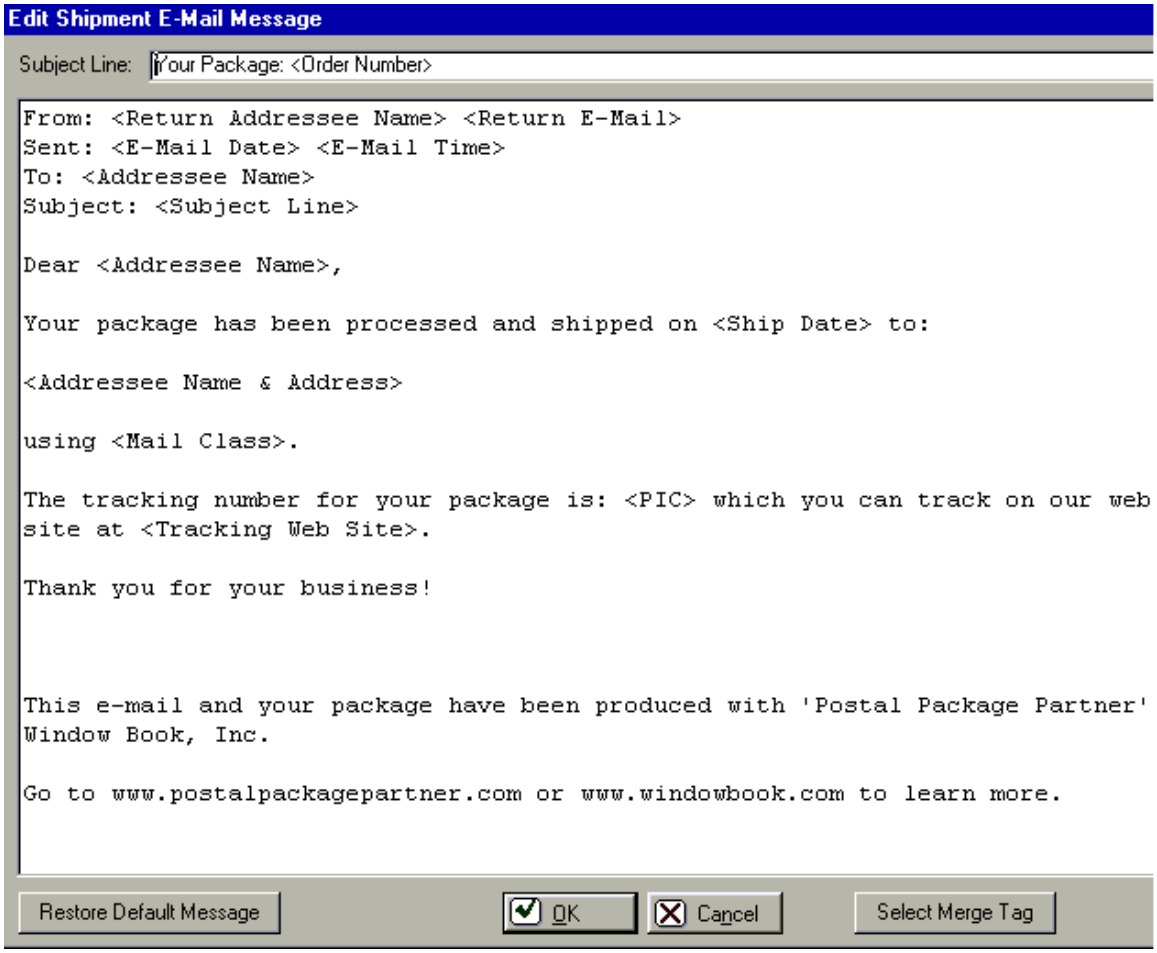
There are two e-mail notification messages that can be edited: "Shipment Message" sends an e-mail to notify your customer when their package is shipped and "Delivery Message" sends an e-mail to notify your customer when their package is delivered. These are "generic" messages that can't currently be changed for each package.

Follow the guidelines below when customizing your e-mails:

Go To File => System Setup => Mailer Configuration
Select the Communications/E-Mail tab:



Click on the Message you would like to customize (Shipment Message or Delivery Message)



You can edit the text as you would like it to appear.

Merge Tags are fields that you can insert which will vary for each package, such as the Order Number, Addressee Name, and Ship Date.

You can insert Merge Tags by clicking on the "Select Merge Tag" button, highlighting the field you would like to insert and pressing "OK". This will create text that appears in the following format: **&ltOrder Number&gt**.

You can also delete Merge Tags by deleting the text that appears in the following format: **&ltOrder Number&gt**

When you are finished editing the text, click on the "OK" button to save your changes

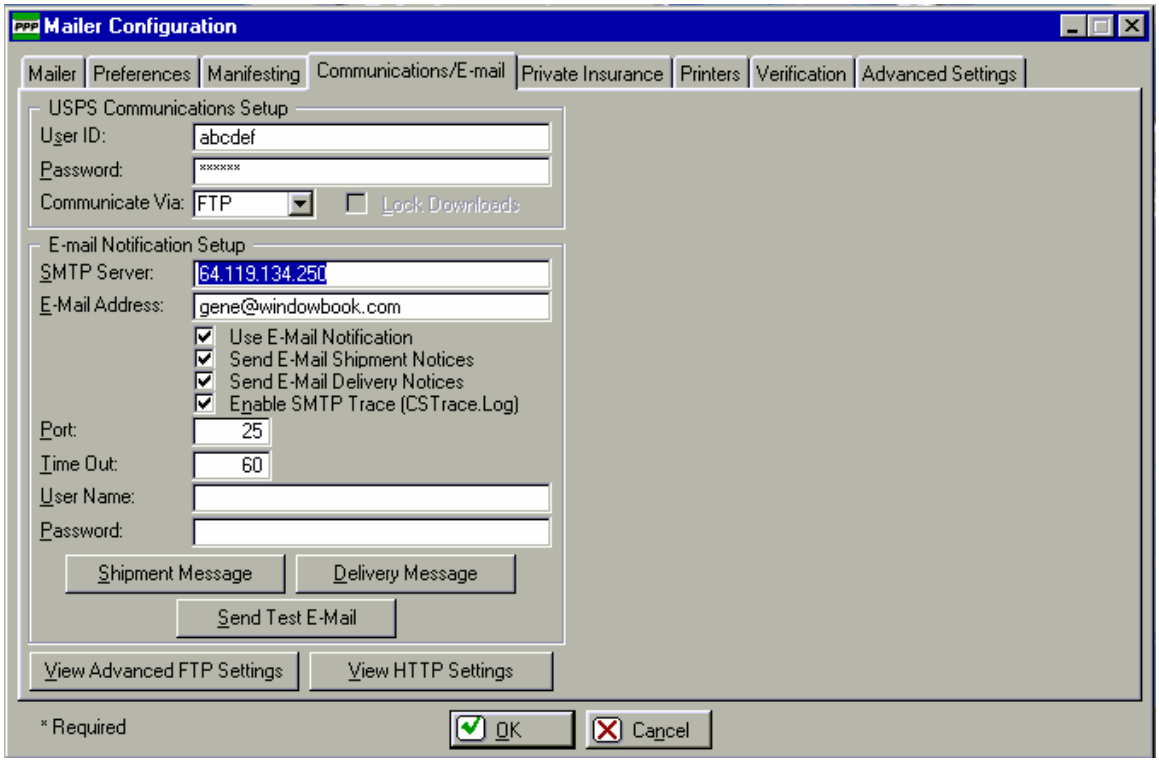
Note: there are changes to the e-mail customization screens described in the following:
New E-mail features

E-Mails Not Being Sent

Things to check to ensure that e-mails sent to your customers are informing them of the status of their order:

Make sure you enter the customer e-mails in the "E-Mail Address 1:" and "E-Mail Address 2:" text boxes. To locate this "E-Mail Info" screen go to Daily Shipping and select the Print Labels tab. Highlight an individual package and click the Change button. Then click the E-mail Info button. Place check marks where appropriate. The second e-mail address is optional.

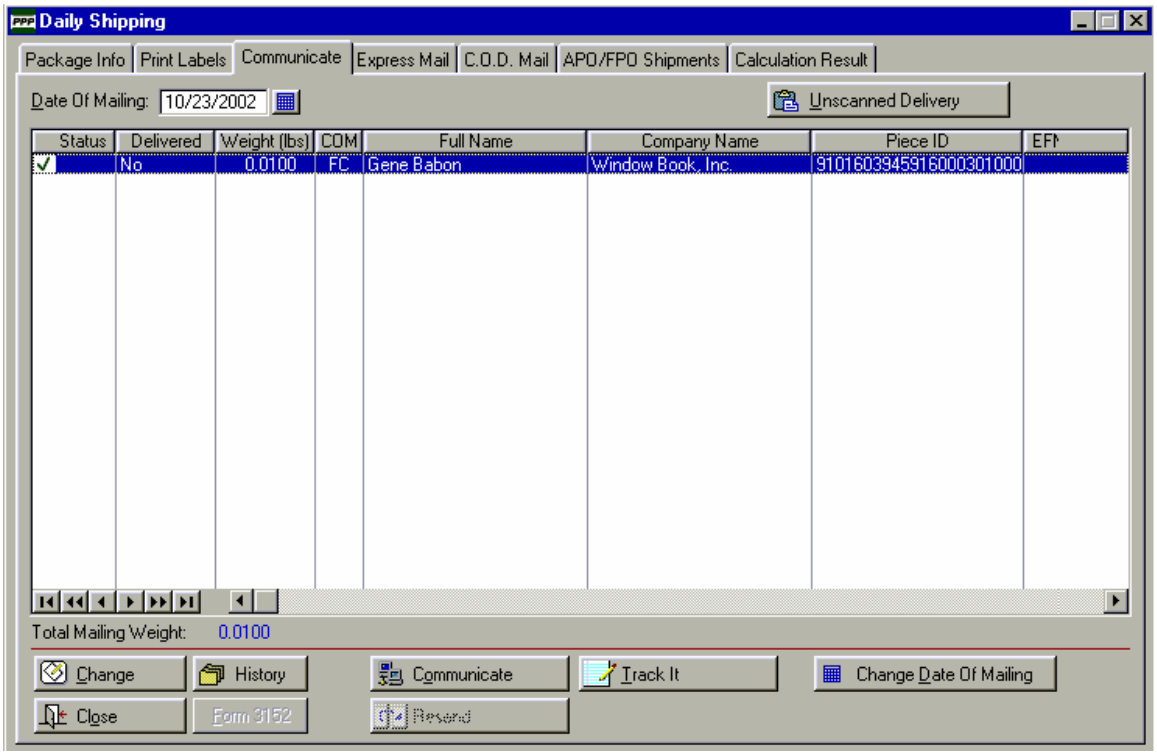
Check with your Internet Service Provider and make sure your SMTP address is correctly configured in Postal Package Partner. You can find this setting by going to File => System Setup => Mailer Configuration and looking at the text box next to "SMTP Server." The SMTP server address is provided by your Internet Service Provider (ISP) when you open an account, and is necessary to successfully send and receive e-mail. Call your ISP to get the address and then enter it into your program.



Also try a test e-mail to make sure your SMPT server is enabled. You can do so by clicking on the Send Test E-mail button on the above screen.

You also want to make sure that Enable SMTP Trace (CSTrace.Log) is checked. This feature will create a log file that can be used to diagnose future e-mail problems should they arise.

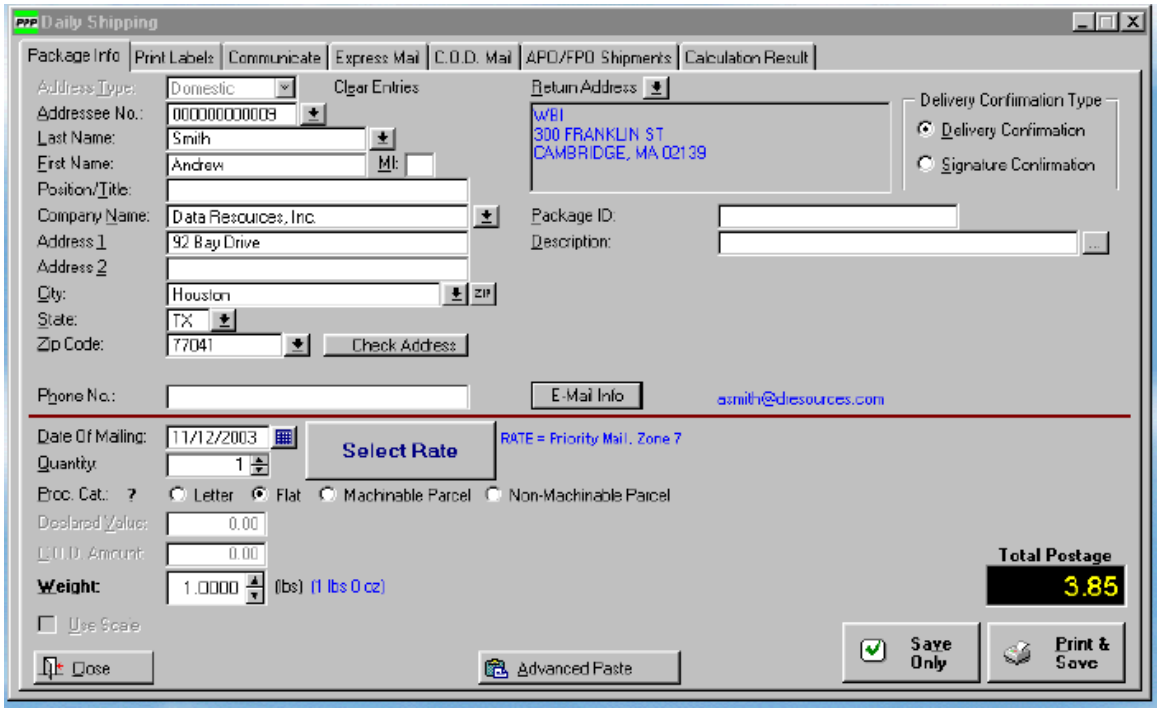
Lastly, make sure you press the Communicate button when you are ready to upload your package information. The e-mails are triggered by the receipt of information from the USPS about the package status and clicking the Communicate button begins this process.


Daily Shipping
Package Info
Print Labels
Communicate
Express Mail
C.O.D. Mail
APO/FPO Shipments
Calculation Result
Date Of Mailing: 10/23/2002
Unscanned Delivery
Status
Delivered
Weight (lbs)
COM
Full Name
Company Name
Piece ID
EFN
No
0.0100
FC
Gene Babon
Window Book, Inc.
9101603945916000301000
Total Mailing Weight: 0.0100
Change
History
Communicate
Track It
Change Date Of Mailing
Close
Form 3152
Resend

How To Stop E-Mail Confirmation

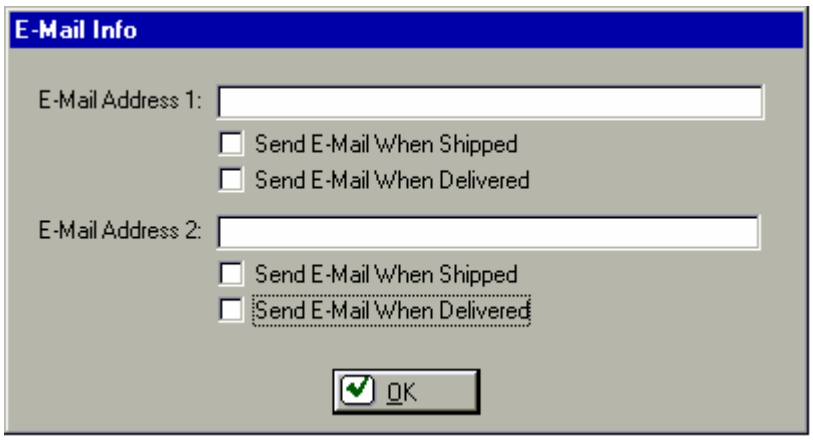
To stop e-mail confirmation from reaching the destination for one of your packages that has already been sent, follow these steps:

Go to Daily Shipping and Click on the Package Info tab to access the customer record:



Click the E-Mail Info button

Delete the e-mail address Uncheck both check boxes associated with that e-mail address (When Shipped and When Delivered)


E-Mail Info
E-Mail Address 1:
Send E-Mail When Shipped
Send E-Mail When Delivered
E-Mail Address 2:
Send E-Mail When Shipped
Send E-Mail When Delivered
OK

Address Checking in PPP

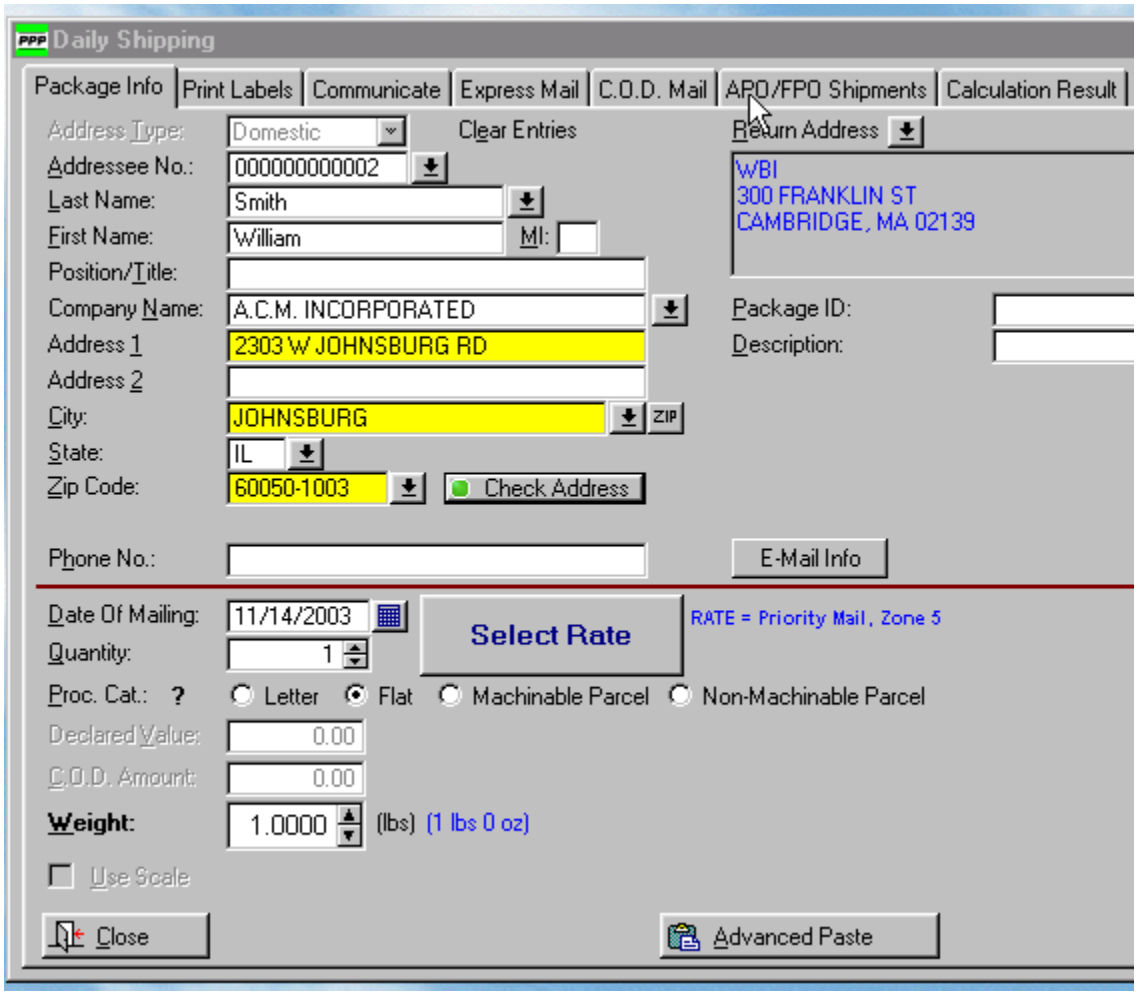
Address Checking in PPP

Here is how Address Checking in Postal Package Partner works: Using the Postal Service's Online Database PPP will check the address against the latest address and Zip+4 information by comparing the following:

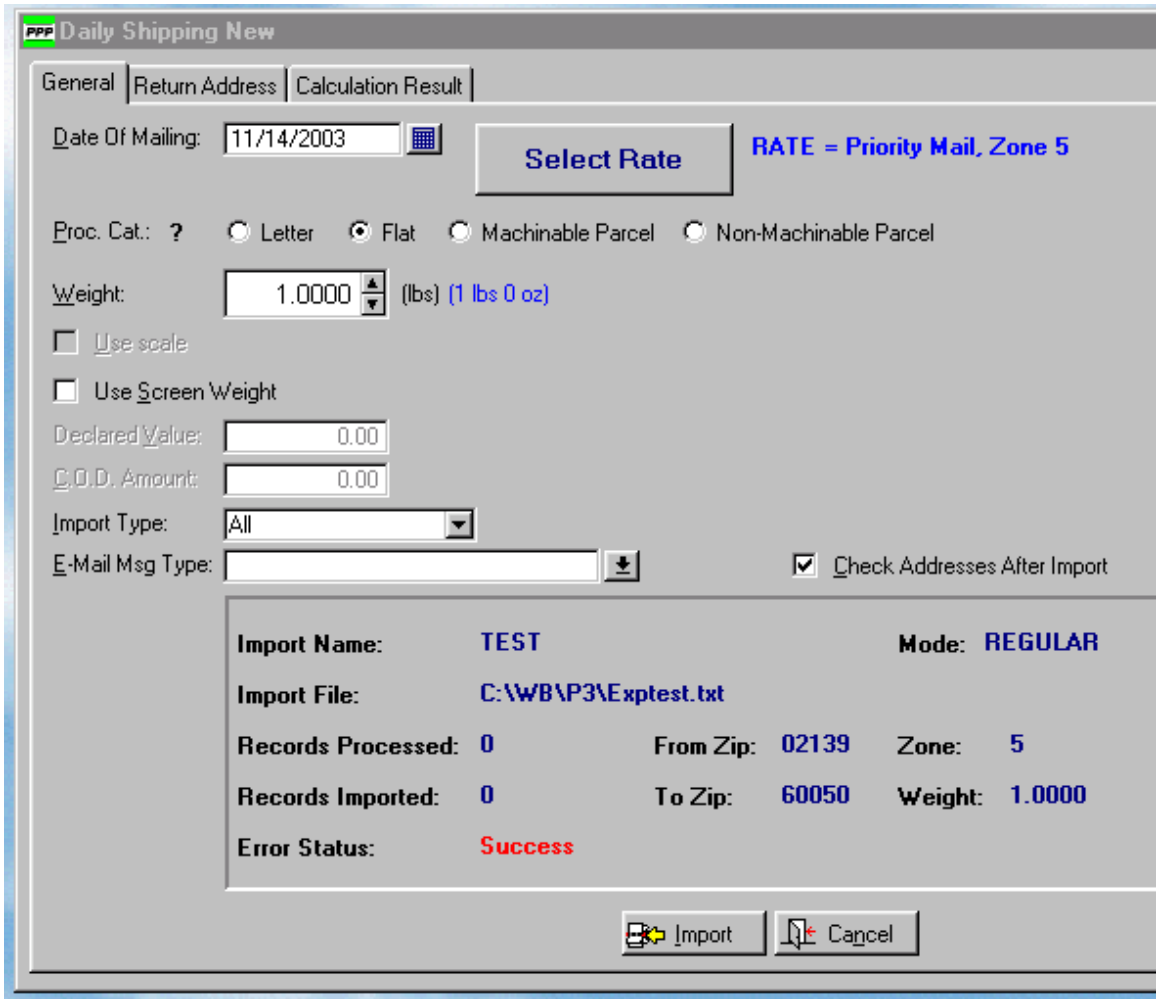
- Zip and Zip+4
- State
- City
- Street Address

These are matched with the address information. If it finds a close match it will change the address to the one in the Post Office Database and mark the changes in Yellow.

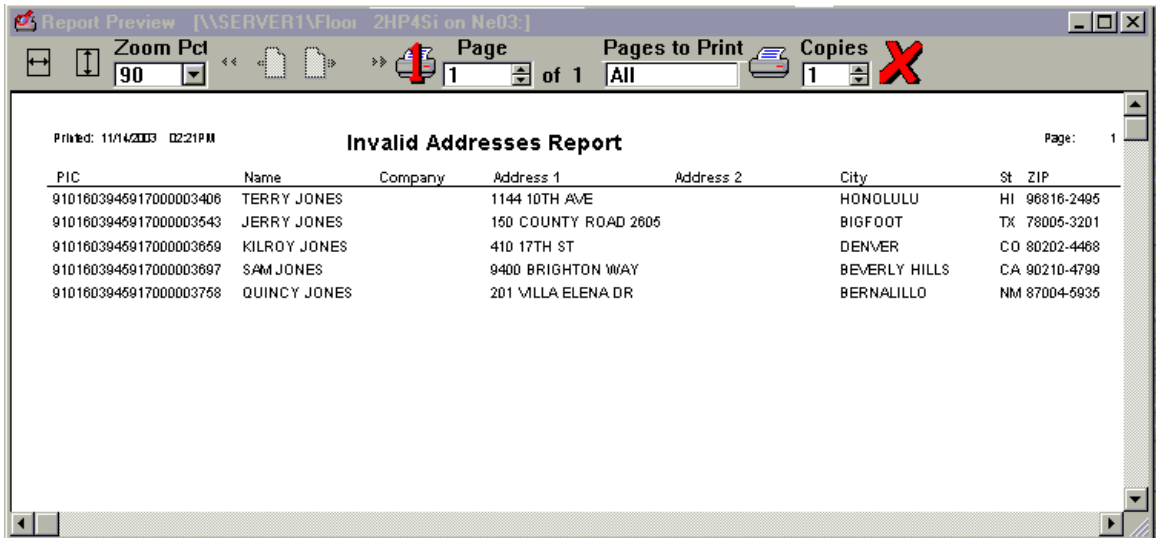
From the Package Info Screen: Click on the "Check Address" box. When the program finds a match it puts a green dot next on the check address box and highlights the added or changed information in yellow. If it finds a close match it will bring up this screen when the program has found a similar/same address in the Post Office Database. If this is correct click "Correct". Postal Package Partner saves the changes and marks them in yellow, then puts a green dot on the "check address" box.



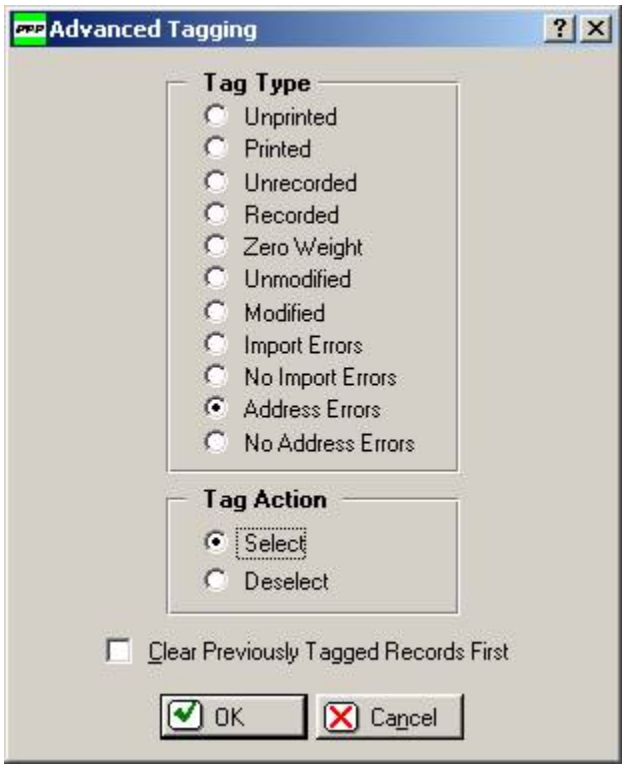
Address checking when doing an import: On the import screen there is a "check address" box that must be checked:



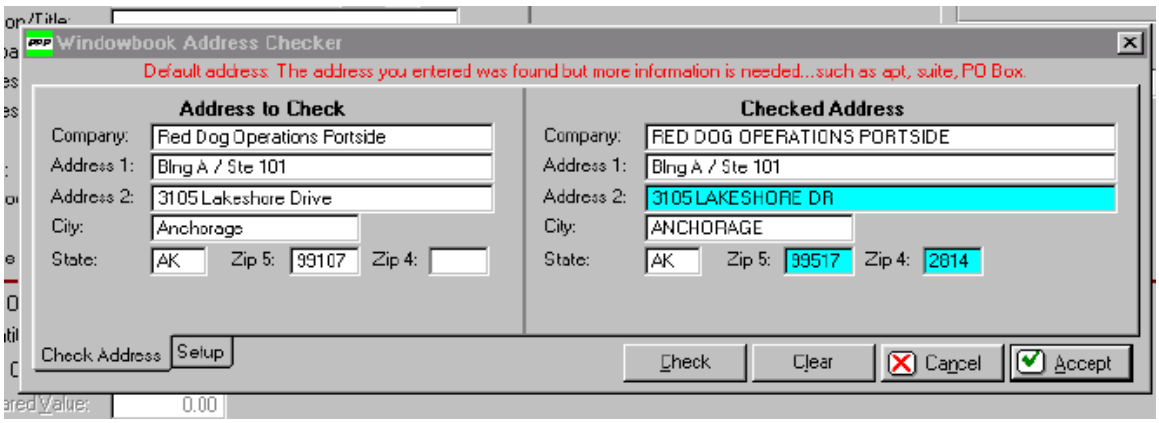
Once you have done your import you will get a report which shows you a list of any addresses that are found to be invalid.



In the daily shipping screen under the "Advanced Tagging" option you can then tag the address errors only. Then go into each address to correct the address information.

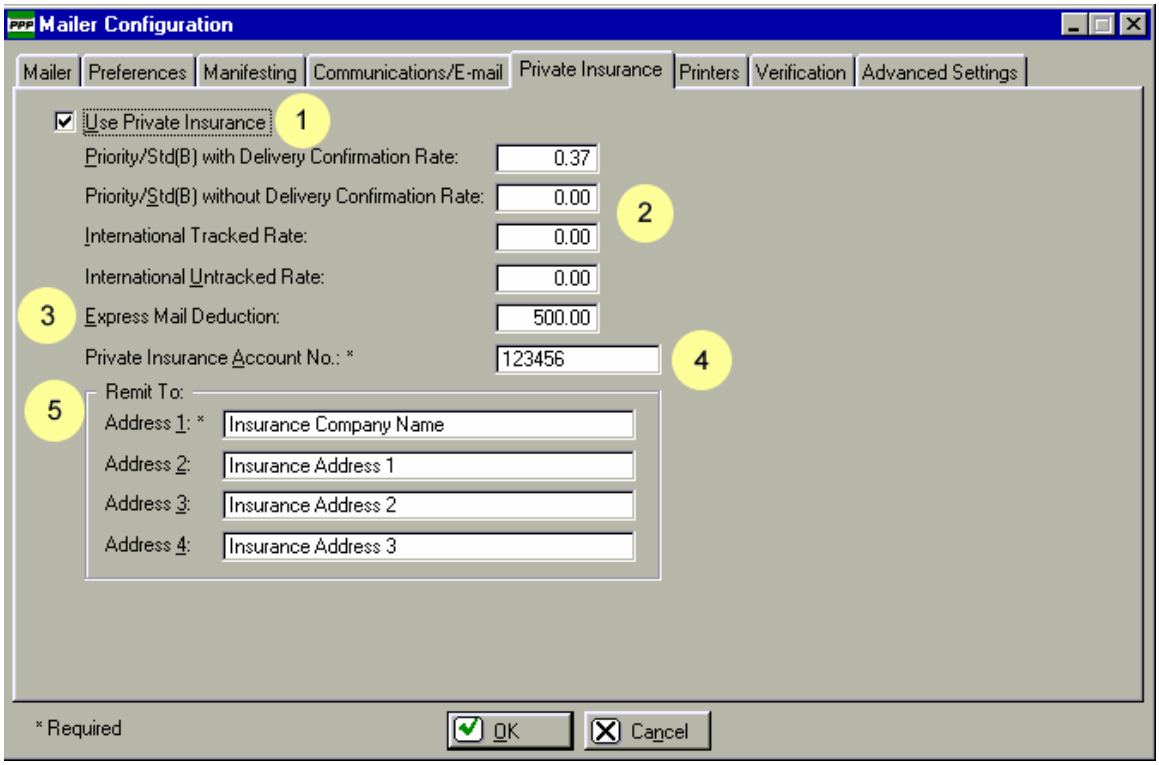


The following screen will appear when the program has found a similar address in the Post Office Database. If this is correct click "Accept". PPP will save the changes and mark them in yellow, then put a green dot on the "check address" box.


Windowbook Address Checker
Default address: The address you entered was found but more information is needed...such as apt, suite, PO Box.
Address to Check
Company: Red Dog Operations Portside
Address 1: Bldg A / Ste 101
Address 2: 3105 Lakeshore Drive
City: Anchorage
State: AK Zip 5: 99107 Zip 4:
Checked Address
Company: RED DOG OPERATIONS PORTSIDE
Address 1: Bldg A / Ste 101
Address 2: 3105 LAKESHORE DR
City: ANCHORAGE
State: AK Zip 5: 99517 Zip 4: 2814
Check Address
Setup
Check
Clear
Cancel
Accept

Using Private Insurance

You can use insurance from a third party carrier. One such insurance company is U-PIC. You can obtain information about this service from your Window Book sales representative. You can get information on other carriers from your postal account manager.



The information you need to provide includes the following:

Use Private Insurance: The first checkbox enables third party insurance support. This must be checked if you wish to set up private insurance. If checked, you will be able to enter a valuation for third party insurance when you ship parcels. You will also be able to run the third party valuation report. Most third party insurance carriers will require you to enter an invoice number on the shipping record for each package insured.

Rates: You must enter the insurance rates displayed. They are in cost per hundred dollars of declared valuation. For now you need only to fill out the first rate, the one for delivery confirmation parcels.

Express Mail Deduction: Normally set to $500.00 The first $500.00 is covered by USPS.

Private Insurance Account Number: Enter the account code that your

insurance carrier has assigned to you.

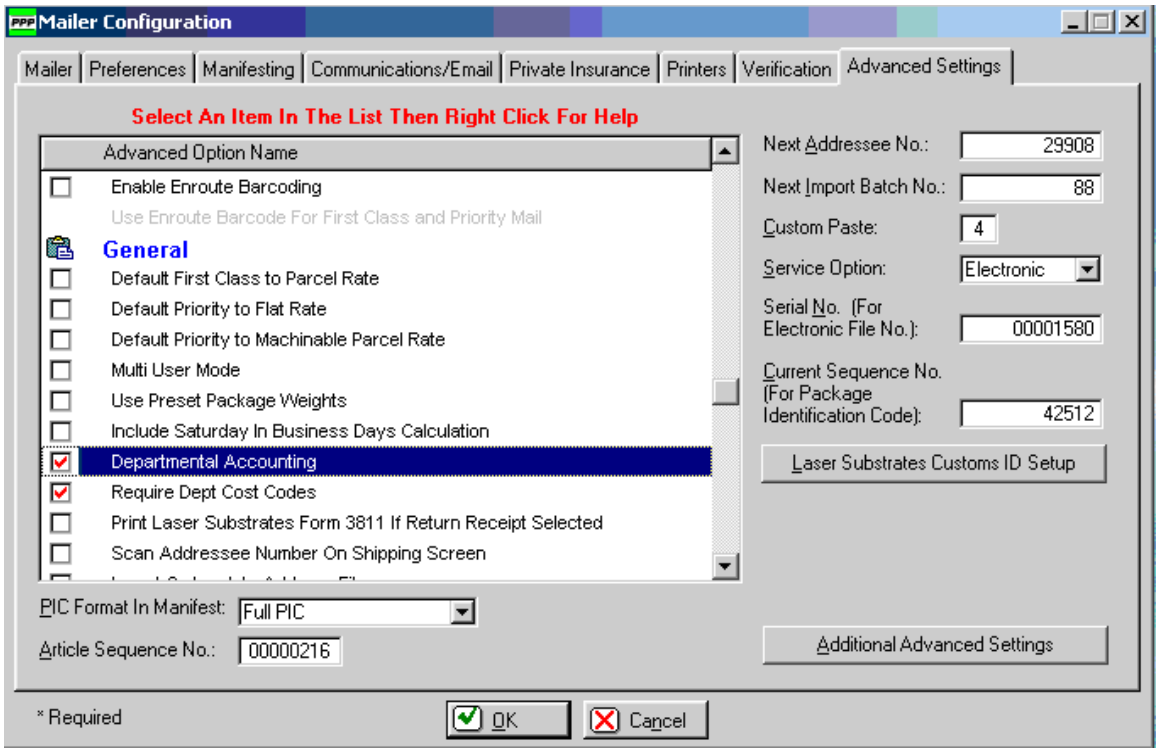
Remit to Address: This should include the company name and address where you send your remittance.

Departmental Accounting

Using Departmental Accounting

Departmental Accounting is a feature of Postal package Partner which allows you to keep track of your shipping costs, including postage, insurance and fees split out by Department and Department Cost Code. You can print the information in a report based on any interval, be it weekly, biweekly, monthly or yearly, by choosing the beginning and ending date of the report. It's a handy feature, especially for large companies who need to keep strict control of their costs by department.

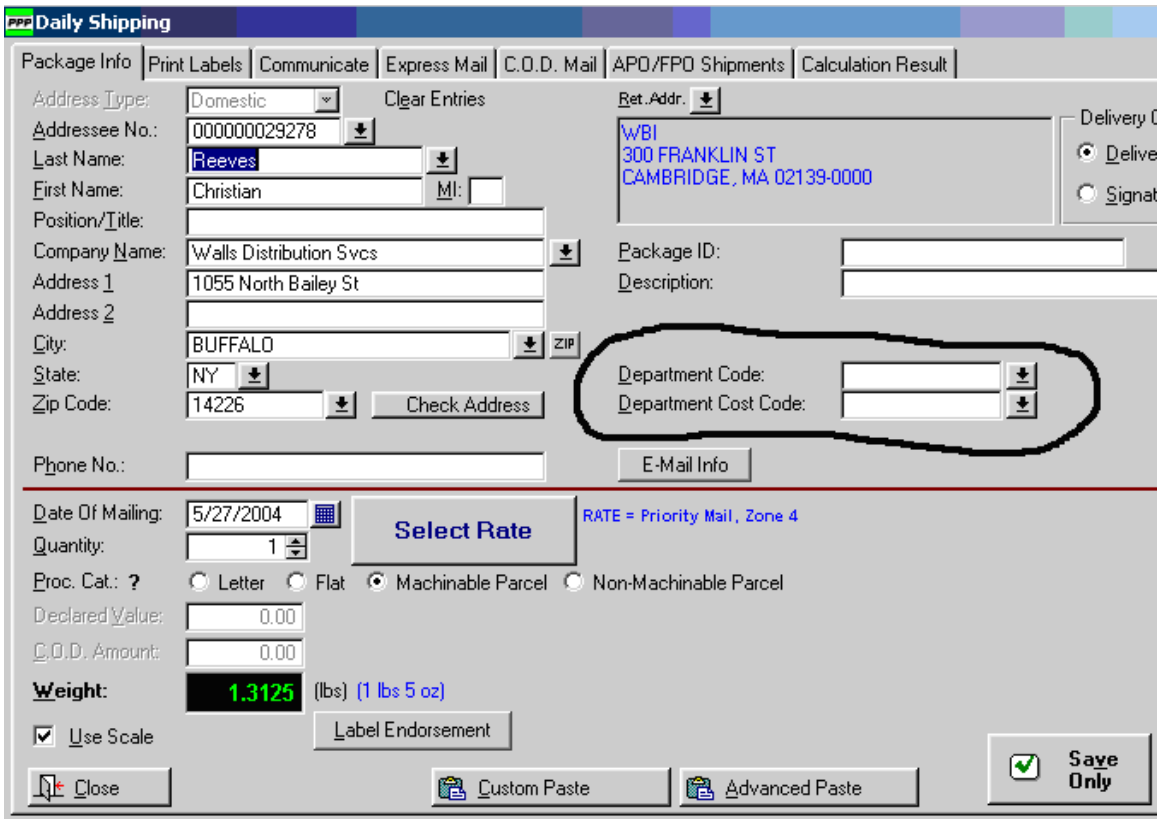
1. You can turn on the Departmental Accounting option by going to File => System Setup => Mailer Configuration => Advanced Settings (General).



2. Double click to checkmark the option you want. Checking "Departmental Accounting" forces all packages to have a Departmental Accounting Code. Checking "Require Dept Cost Codes" forces all packages to have a Cost Code.

3. Set up your Department Codes and Department Cost Codes from the "Maintenance" menu.

4. When packages are input individually in the "Daily Shipping" screen the user is prompted for the proper Department Code and Departmental Cost Code, which are chosen from a table of the existing values. The package cannot be saved or printed until the codes are chosen.



5. When you click the down-arrows in either the Department Code or Department Cost Code box you get a drop down box which allows you to choose the appropriate codes (entered in step 3):

Reporting

1. The Departmental Accounting Report (4. Reports => 1. Shipping Reports => 2. Departmental Accounting from the main Navigator Screen) can be produced on a weekly or monthly or other basis to show your total postage, fees and insurance costs broken out by Department.

Date: 05/27/2004 WBI Page: 1
Time: 03:47PM

Departmental Accounting Report

For Dates From: 05/24/2004 To: 05/31/2004

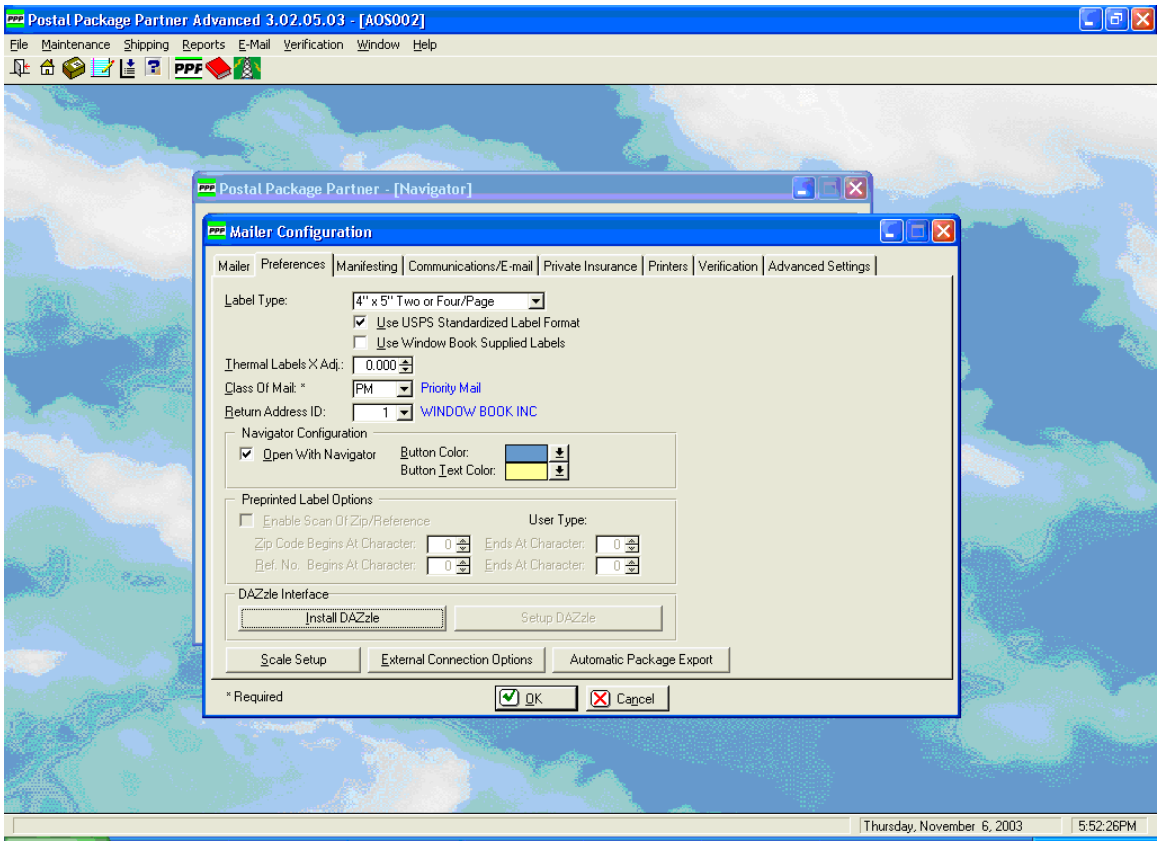
Cost Code	Count	Postage	Fees	USPS Total	Private Insurance	Total
Dept: **123 Warehouse**						
123-10 Scales:	2	7.70		7.70	0.00	7.70
123-12 Barcode Readers:	2	7.70		7.70	0.00	7.70
123 Warehouse Totals:	4	15.40		15.40	0.00	15.40
Dept: **125 External**						
125-10 Add-Ons:	1	3.85		3.85	0.00	3.85
125-11 Scale Reader:	1	3.85		3.85	0.00	3.85
125 External Totals:	2	7.70		7.70	0.00	7.70
Dept: **127 Documents**						
127-10 User Manual:	3	11.55		11.55	0.00	11.55
127-11 Brochure Package #1:	1	3.85		3.85	0.00	3.85
127-12 Brochure Package #2:	1	3.85		3.85	0.00	3.85
127-13 Catalog:	1	3.85		3.85	0.00	3.85
127 Documents Totals:	6	23.10		23.10	0.00	23.10
05/24/2004 - 05/31/2004 Period Totals:	12	46.20		46.20	0.00	46.20

Note: If you are using an import file to enter your packages the Department Accounting and Cost Codes can be included in the import file. The fields containing this information in your import file must be matched to the appropriate fields in Postal Package Partner in the import template.

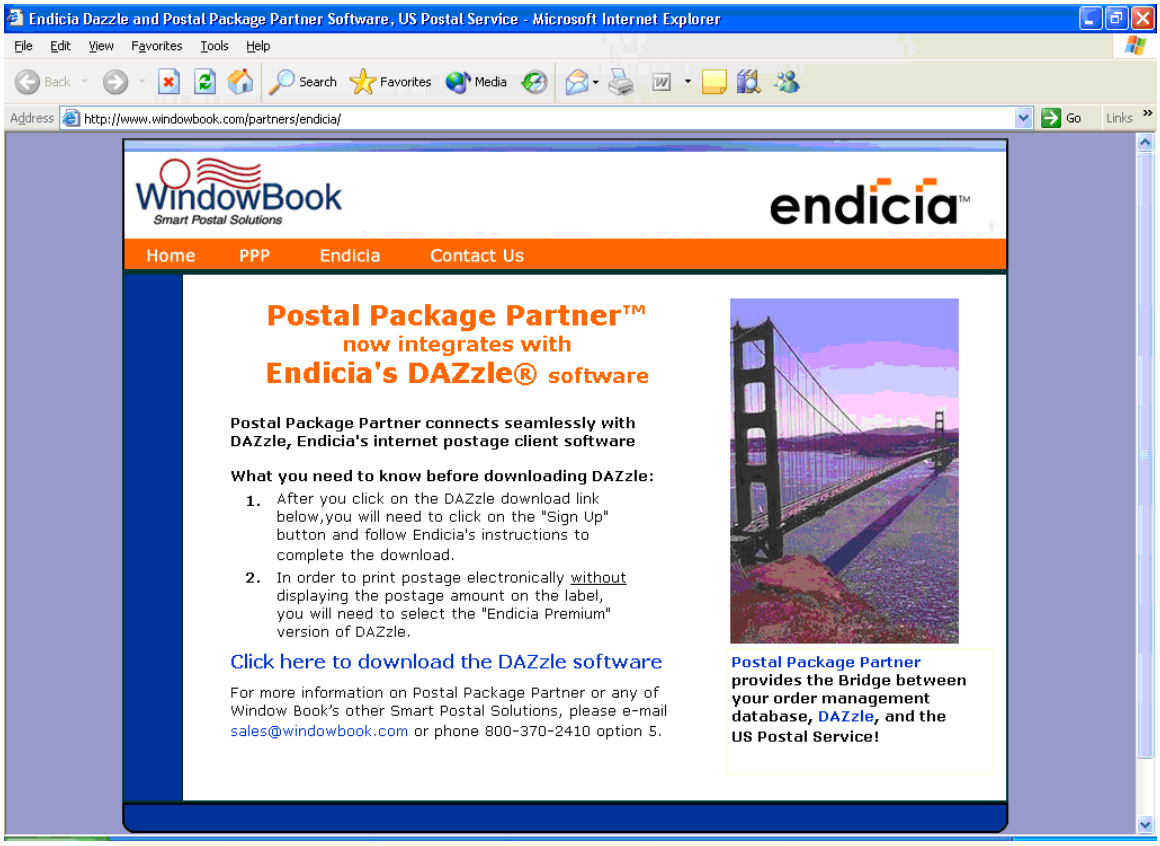
Printing DaZzle Postage With Postal Package Partner

Installing & Configuring DaZzle

To install DAZzle from Postal Package Partner, open the File menu and choose System Setup > Mailer Configuration and select the Preferences tab, shown below:


Postal Package Partner Advanced 3.02.05.03 - [AOS002]
File Maintenance Shipping Reports E-Mail Verification Window Help
Postal Package Partner - [Navigator]
Mailer Configuration
Mailer Preferences Manifesting Communications/E-mail Private Insurance Printers Verification Advanced Settings
Label Type: 4" x 5" Two or Four/Page
Use USPS Standardized Label Format
Use Window Book Supplied Labels
Thermal Labels X Adj.: 0.000
Class Of Mail: * PM Priority Mail
Return Address ID: 1 WINDOW BOOK INC
Navigator Configuration
Open With Navigator
Button Color:
Button Text Color:
Preprinted Label Options
Enable Scan Of Zip/Reference
User Type:
Zip Code Begins At Character: 0 Ends At Character: 0
Ref. No. Begins At Character: 0 Ends At Character: 0
DAZzle Interface
Install DAZzle
Setup DAZzle
Scale Setup
External Connection Options
Automatic Package Export
* Required
OK
Cancel
Thursday, November 6, 2003
5:52:26PM

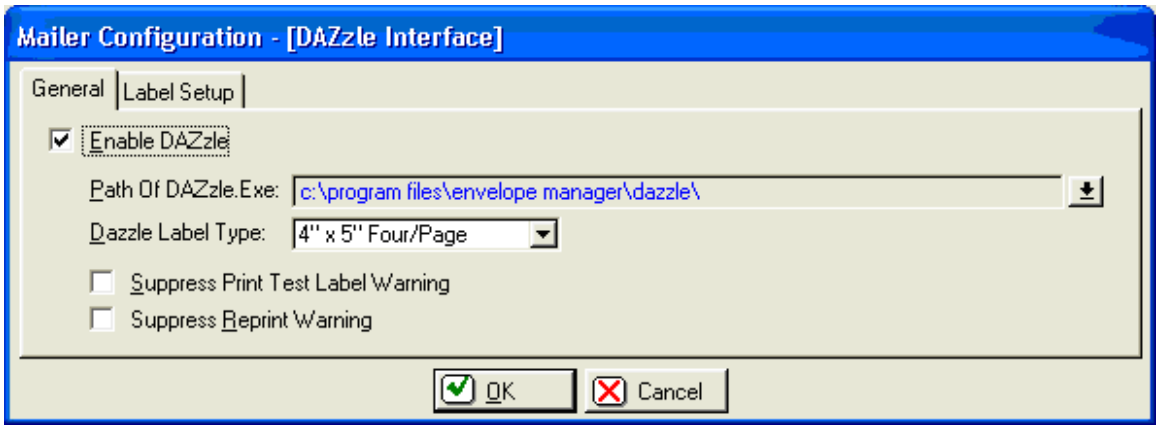
From PPP's Preferences tab, select the "Install DAZzle" button, which brings you to the Window Book/Endicia Partnership Web page, shown below.


Endicia Dazzle and Postal Package Partner Software, US Postal Service - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://www.windowbook.com/partners/endicia/
Go Links
WindowBook
Smart Postal Solutions
endicia™
Home PPP Endicia Contact Us
Postal Package Partner™
now integrates with
Endicia's DAZzle® software
Postal Package Partner connects seamlessly with DAZzle, Endicia's internet postage client software
What you need to know before downloading DAZzle:
1. After you click on the DAZzle download link below,you will need to click on the "Sign Up" button and follow Endicia's instructions to complete the download.
2. In order to print postage electronically without displaying the postage amount on the label, you will need to select the "Endicia Premium" version of DAZzle.
Click here to download the DAZzle software
For more information on Postal Package Partner or any of Window Book's other Smart Postal Solutions, please e-mail sales@windowbook.com or phone 800-370-2410 option 5.
Postal Package Partner provides the Bridge between your order management database, DAZzle, and the US Postal Service!

Read the instructions, "What you need to know before downloading DAZzle."

Select "Click here to download the DAZzle software." You will be asked to fill out an online application and provide a credit card number in order to download the free, 30-day trial DAZzle software. Endicia's DAZzle Internet Postage software is free for your first 30 days. After that, normal service charges will apply. The free offer does not include postage. Users are responsible for paying all postage purchased from their account.

After downloading the software to your desktop or to the folder of your choice, select DAZzle's setup icon. After completing the setup instructions, return to PPP's File > System Setup > Mailer Configuration and select the Preferences tab. The Setup DAZzle button should now be active. Select Setup DAZzle, which reveals the pop-up box shown below:



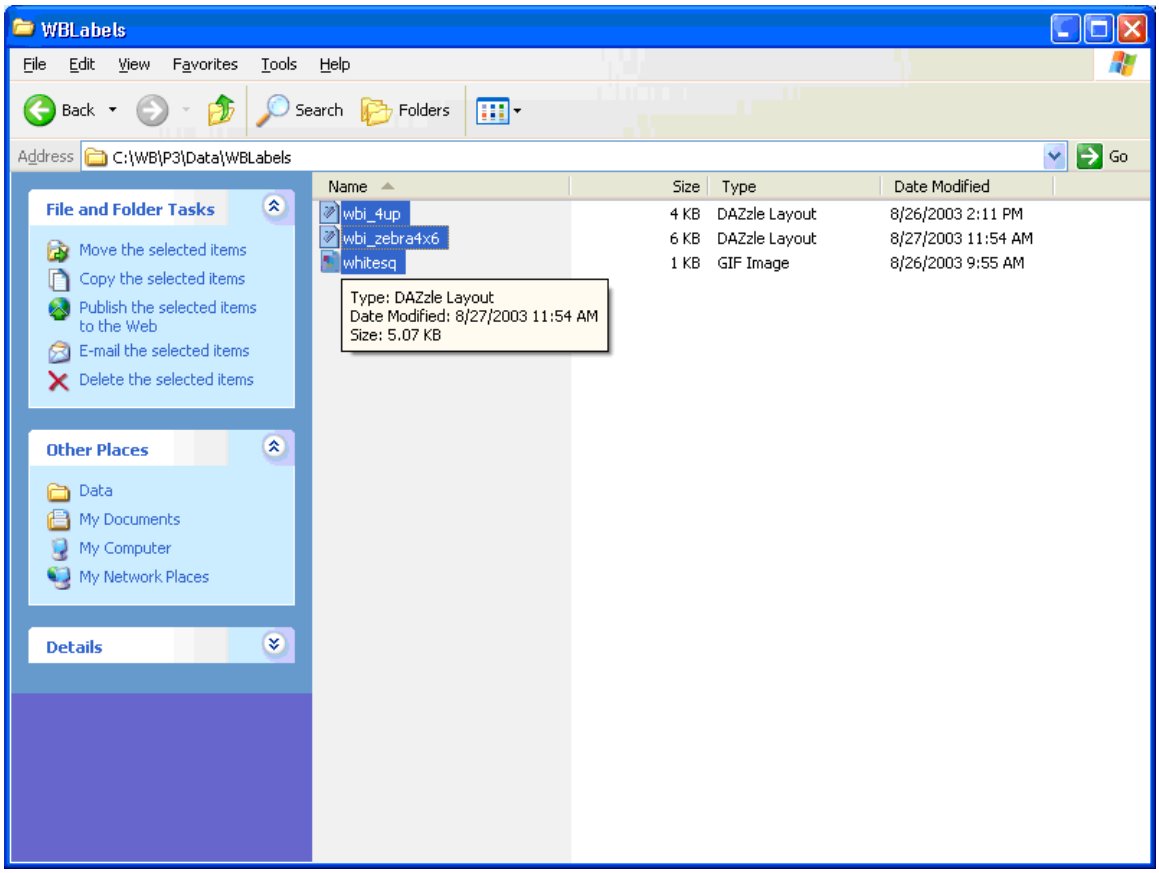
Check off the "Enable DAZzle" box to automatically charge postage to your credit card via your DAZzle account with Endicia.

Select the down arrow to choose where to save your DAZzle files on your system.
Leave the Suppress Print Test Label Warning un-checked so that you may view labels prior to being charged for postage. Please note: after you have become familiar with the software, you may want to return here and check this box off in the interest of saving time.

From your desktop, go to the following folder on the drive where PPP is installed:

C:\WB\P3\Data\WBLabels

And copy the files shown below:



Copy these files and paste them into the following folder on the drive where DAZzle is installed:

C:\Program Files\Envelope Manager\DAZzle

Your Postal Package Partner Interface to DAZzle should now be complete.

Priority Drop Ship

Overview

Setup

You must be using either the GOLD or ADVANCED version of Postal Package Partner to use this feature. You must also have a thermal printer with 4 X 6 label stock.

1. Go to File/System Setup/Mailer Configuration and go to the Advanced Configuration tab.

2. At the bottom of the 'General Group', check the Enable Priority Mail Drop Ship checkbox. Press OK to save and Exit.

Postage Payment

You can pay for the postage using a permit if you have manifesting enabled on our Advanced or Gold versions or meter strip or Permit if you are using our Advanced version. You can mix both Drop Ship Priority and other mail types can all be included in the same manifest, if you are manifesting.

Delivery Confirmation

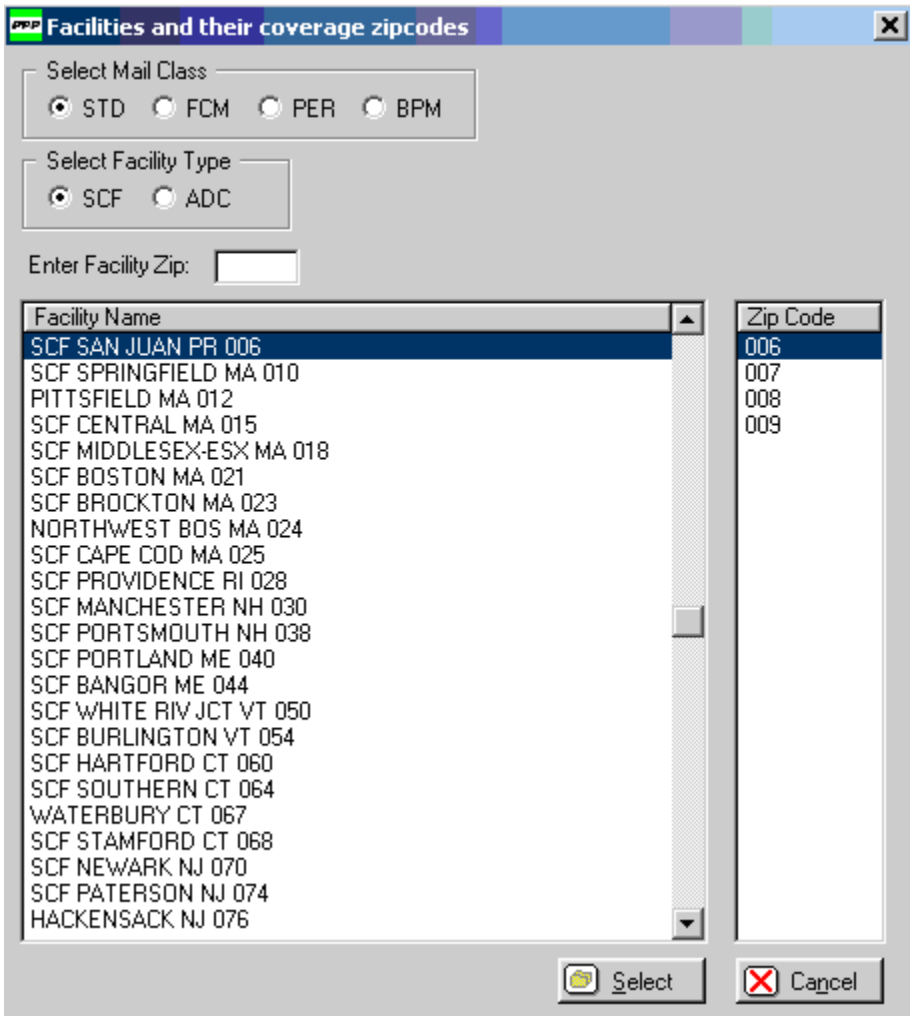
You must be signed up for Electronic Delivery Confirmation before you can use this feature. Tracking and delivery analysis works just as it does for conventional shipments.

Using Priority Drop Ship

1. Go to daily shipping screen

2. Check the new 'Priority Mail Drop Ship Checkbox'. The addressee information will disappear and be replaced by a 'Select Drop Ship Facility' button.

3. Press the Select Drop Ship Facility button. You will get this screen:



The Facility Zip locator above the list allows you to enter the 3 digit or 5 digit facility list from the USPS labeling list if you know it.

The ZIP codes on the right reflect the 3 digit zips supported by the highlighted facility. The first three digits of the destination zip of the sack or tray should be in the list for the facility you have selected.

4. Select the class of mail that is in INSIDE the sacks or trays you are drop shipping.

5. Select what facility type you are going to. Currently we can drop ship to ADC and SCF facilities. We will be adding DDU's shortly and will add BMC's and ASF's when they are approved for Delivery Confirmation. This approval is pending.

6. Select whether you are drop shipping trays or sacks. In most cases you will be required to put trays inside sacks so you would select 'Sacks'. You must get special permission to ship trays by themselves via Priority Mail.

7. When you print the label, it is to be attached to the USPS apply it to the PS Tag 161, Open & Distribute, in the space provided. The shipping label must not cover the Postal Service section at the bottom of Tag 161.

System Maintenance

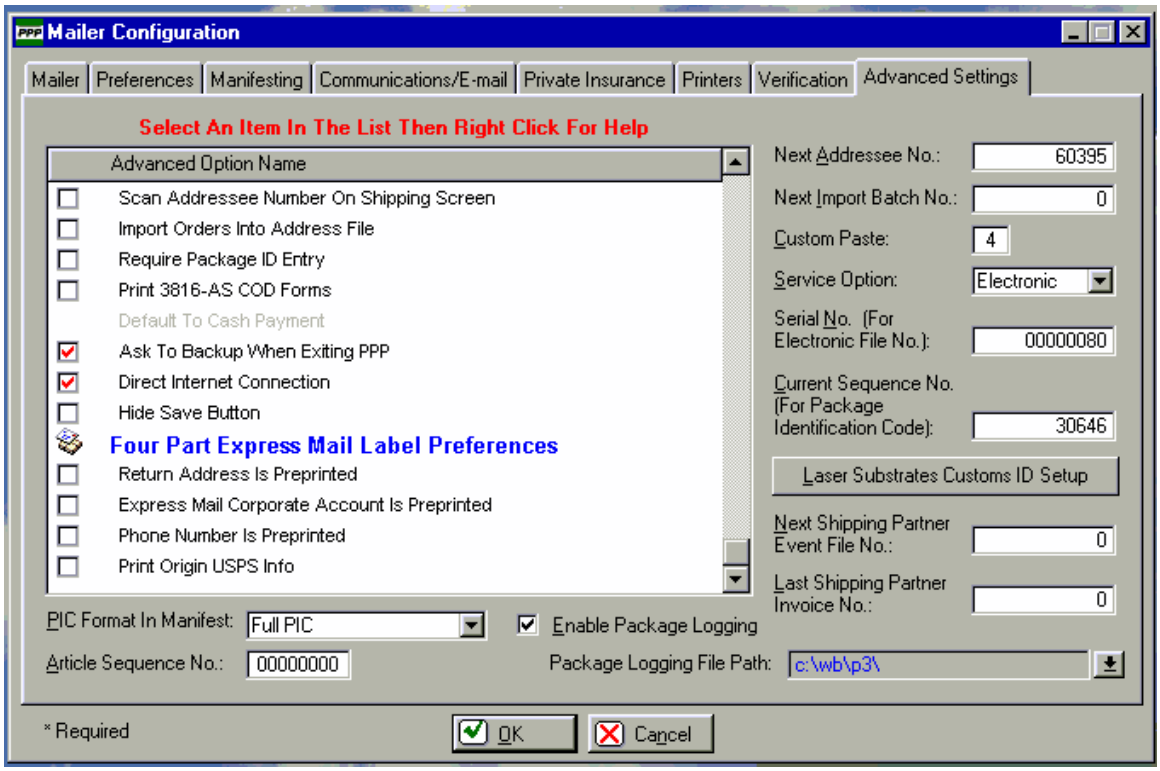
System Maintenance Overview

Regular maintenance of your Postal Package Partner software will help improve the program's performance in the long run. You can compare software maintenance to automobile maintenance. Some tasks, such as oil changes and tire rotation, directly affect the performance of the car. Others, such as cleaning the inside of the car, are more cosmetic.

Backing Up Your Data

Backup of your files after every session will insure the ability to recreate those files if they are accidentally lost. You can enable a reminder to back-up in Postal Package Partner by enabling the "Ask To Backup When Exiting PPP" button in Advanced Settings.

Procedure: Go to File => System Setup => Mailer Configuration. Click the Advanced Setting tab. Check the "Ask to Backup When Exiting PPP" check box. Then, click the OK button.



Exit Postal Package Partner

Click the "Yes" button when prompted "Do you want to back up your data?"

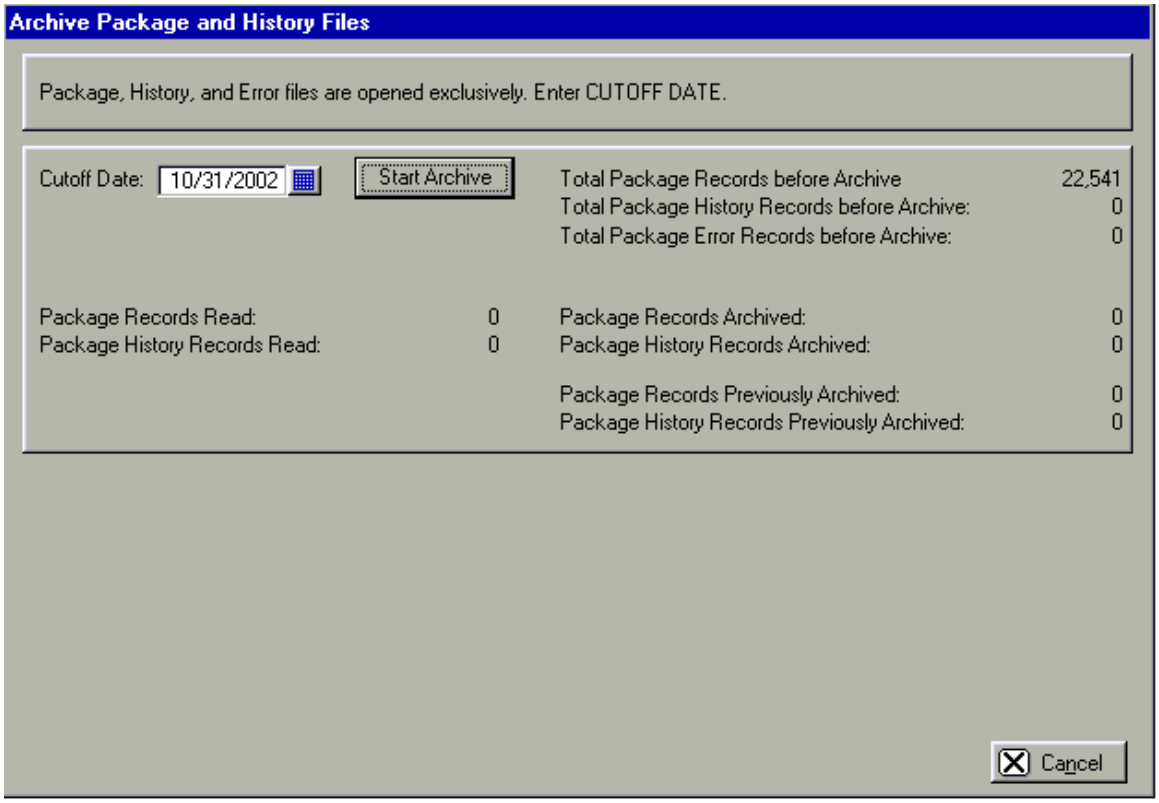
This action will open your PPP Backup and Restore Module

Click the Backup button and follow the prompts

Archiving Your Data

Archiving will minimize the possibility of data corruption that may occur during the manipulation of large data files. Based on the assumption that 100,000 packages represent about 10 megabytes of data, large mailers who ship more than 5,000 packages per day (100,000 packages per month) should archive their data every four to six weeks (or when they have accumulated no more than 15 megabytes of data). Smaller mailers who ship less than 5,000 packages per day should archive their data every two to three months using the same limit as a guide.

Procedure: Go to File => Utilities => Archive Package and History Files Click the Calendar button to the right of the textbox to select your Cutoff Date Click the Start Archive button.

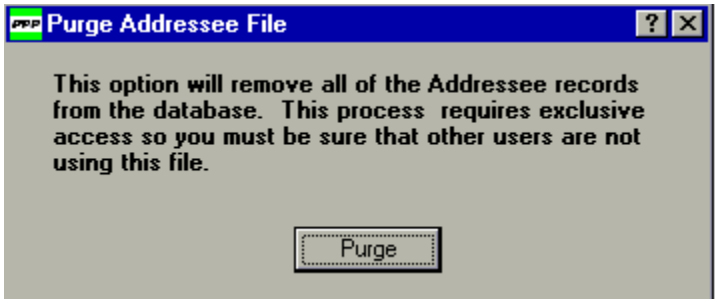

Archive Package and History Files
Package, History, and Error files are opened exclusively. Enter CUTOFF DATE.
Cutoff Date: 10/31/2002
Start Archive
Total Package Records before Archive 22,541
Total Package History Records before Archive: 0
Total Package Error Records before Archive: 0
Package Records Read: 0
Package History Records Read: 0
Package Records Archived: 0
Package History Records Archived: 0
Package Records Previously Archived: 0
Package History Records Previously Archived: 0
Cancel

Click the OK button when archive has been completed

Purging The Addressee File

The addressee file contains all addresses of every individual you've ever shipped a package to. Over time this list may become too large to work with and can be purged, especially if you are importing package information on a daily basis. To purge your addressee file do the following steps:

Go to File => System Maintenance => Purge Addressee File


Purge Addressee File
This option will remove all of the Addressee records from the database. This process requires exclusive access so you must be sure that other users are not using this file.
Purge

Note: This feature does not have an undelete option
Note: Your Package History will not be affected by this procedure

Once you are sure that you want to delete these addresses, click the Purge button.

Resetting Window Sizes and Positions

From time to time you can run into problems with screens moving too far off the screen, "double printing" on entry screens and other possible problems displaying information correctly. Select this option to reset the screen positions to their original ones. You can drag screens to their desired positions by pointing to the blue title bar of the screen you want to move, holding down your left mouse button and dragging the screen to its desired position then releasing the mouse button. This new position will be saved automatically.

Click File => System Maintenance => Reset Window Sizes and Positions to access this window.

Click OK

Optional Modules

Express Mail Manifesting

Where To Find The USPS Application Form Filler for Express Mail

1. Insert the Postal Package Partner CD into your CD-ROM drive. If the program does not start automatically, double click install.bat from the folder of your CD-ROM drive. You may access the FormFiller by clicking on the "USPS Applications" link.

2. If you do not have a copy of the CD you may access the FormFiller at: http://www.windowbook.com/ppp/downloads/gssetup.exe

3. A pre-recorded online tutorial, "USPS Application Form Filler Training," is available at: http://www.windowbook.com/support/demos.htm - ppp. You should access the tutorial for Postal Package Partner Advanced users.

Complete the USPS Application forms Using the Form Filler Software

1. You will be asked if you are applying for MAC Gold program. You should click "No" in answer to this question.

2. Click on the button "Additional Forms for Other Services"

3. Click on "Express Mail Manifest System Application."

4. Continue the application process by clicking "Next" and filling out the necessary information until you come to the end, where you should click on "Print and Save".

5. Sign and date page one of the form.

6. Give your completed Express Mail Manifest System Application form to your USPS Account Representative, and make sure that you have this sent in immediately.
*USPS Representative: the instructions for submitting this form may be found at the bottom of its fourth page.

Configure Your PPP System for Express Mail Manifest Testing

A. Enter your USPS Corporate Account information

1. Make sure you are the only one using Postal Package Partner (PPP), and launch PPP.

2. Click on the "Daily Shipping" button. Open the "Communications" tab. Make sure that you have nothing in the communicate tab when you follow the procedures below.

3. Select "Maintenance" > "Return Address" from the menu bar across the top of your PPP screen.

4. Select your return address, and click "Change."

5. Take this opportunity to review the information under the "General" tab and to make any corrections.

6. Open the "Express Mail" Tab.

7. Select "Corp. Acct." from the "Payment Method" pull-down menu.

8. Enter your Express Mail Corporate Account Number in the "Account No." field. You need a valid Express Mail Corporate Account to participate in this program. Click "OK," then "Close."

B. Complete Mailer Configuration

1. On the top Menu Bar Go to "File" > "System Setup" > "Mailer Configuration."

2. On the "Mailer" tab, Check the Test Mode checkbox (down towards the bottom of the screen). DO NOT click on the Add Test Records button. This is currently for Priority Mail Test Records ONLY.

3. Click on the "Preferences" tab. Make sure that the label format that you are using is listed in the form type field. 4" x 6" Thermal labels are usually the best for 1-ply Express Mail Manifest labels.

4. Make sure the "Return Address ID" field has the return address you edited in part above.

5. Click on the "Manifesting" tab. Click on the check box next to "Use Express Mail Manifesting".

6. In the "Starting Sequence No." field, type 12345678.

7. In the "In the Ending Sequence No." field, type 12345900.

8. In the "Current Sequence No." field, type 12345678.

9. In the "PIC Prefix" field, type EA.

10. Click "Close" to close the Mailer Configuration window.

Import Your Test Records

1. Save the text file "Exptest.txt" to your C:\WB\P3 directory (you should receive this file as an e-mail attachment to this document).

2. Launch Postal Package Partner, and click on the "Import/Export" button from the Navigator window. Click on the "Import Data" button.

3. Give your import a name such as "Test Import."

4. Click on the "Set Import Type," and select the type of file that you will import. If you use our "Exptest.txt" file, click "D" for delimited text.

5. Select the Import File "Exptest.txt" using the Browse button.

6. Change the "File to Import" to "Package."

7. Click the checkbox titled "Skip first record on import."

8. Match the field names in the import file (left hand window) to the target field names on the template (right hand window) by highlighting both the import field name and target field name and pressing the Right Arrow button.

9. Once all the necessary fields have been matched, press the "import" button

10. A screen similar to the Daily Shipping screen will appear. Make sure that the "Use screen weight" checkbox is NOT checked. Make sure that the "Express" Class of Mail button is chosen.

11. Press the "Import" button to import the test file names.

12. A pop-up window will appear. Select the "Do Not Apply a Query" button.

13. When the import is done close the template and go back to the main Navigator screen.

Print Your Test Labels

1. Click the "Daily Shipping" button on the Navigator screen. Open the "Print Labels" tab.

2. You should see the test records that you have imported in this window, ready to be printed.

3. Make sure that the first 20 of the test records are "Tagged" with a check mark. You may use the "Tag/Untag" button in the bottom left of the window to "Tag" the appropriate records.

4. Click the "Print" button at bottom. 20 labels should print out.

Communicate Your Test Shipping Records Electronically

1. Make sure that you are connected to the Internet by opening your Internet browser.

2. In PPP, click the "Daily Shipping" button on the Navigator screen, and open the "Communicate" tab.

3. All of the same test records should appear in this window. Click on the Communicate Button.

4. You will be asked if you want to print out the "End of Day Report." Click "Yes."

5. You should have 100 records listed as Express Mail packages.

6. You will be asked, "Is the Daily Report Correct?" Click "Yes."

7. Your Express Mail Test Files will upload to the USPS web site.

8. If it does not print out automatically, print Form 3152-e by clicking on the "Form 3152" button at the bottom of the "Communicate" screen.

Print Your Supporting Documents

A. Express Mail Manifest

1. From the PPP Navigator screen, go to "Report" > "Shipping" > "Express Mail Reports" > "Manifest"

2. Print out the report for today.

3. Click Cancel after it prints.

B. Express Mail Manifesting Submission of Customer Printed Labels for Printer Certification

1. Go to your USPS Test Instructions Guide and fill out the "Express Mail Manifesting Submission of Customer Printed Labels for Printer Certification" form.

2. You will need to include the 20 labels you printed with this form.

Submit Your 20 Test Labels and All Documentation
Express mail (Do Not use UPS or FedEx) your 20 test labels and all supporting documentation to the following address:

ATTENTION BARCODE CERTIFICATION
NATIONAL CUSTOMER SUPPORT CENTER
US POSTAL SERVICE
6060 PRIMACY PKWY STE 201
MEMPHIS TN 38188-0001

NOTE: You must return to the "Mailer Configuration Tab" under "File" > "System Setup" and UNCHECK "Test Mode."

Global Express Mail Manifesting

Setting up Global Express Mail Manifesting

Prerequisites

- Postal Package Partner Enabled for Express Mail Manifesting
- The Global Express Manifesting Registration option enabled
- Full time Internet Connection with port 80 or 8080 open
- Must go through Express Mail Manifesting application process and indicate you will be shipping via Global Express. Must submit Manifest samples, sample labels.
- Must have phone numbers entered in all return address records

Mailer Configuration Settings

1. Printers - Make sure report printer is selected. Currently the Customs Form Printer is just for Laser Substrates forms that are still used with APO/FPO shipments.

2. Manifesting - Make sure 'Use Express Mail Manifesting' checked and that the starting and ending sequence numbers and prefix assigned by the USPS are populated. The 'International Button' that appears under Express Mail Manifesting area will allow the user to set their ICM discount. This discount is adjusted 90 days.

3. Communications/E-Mail - Press the Customs Form Settings checkbox and make sure Test Mode checkbox is checked while testing but unchecked when customer goes live. Also the port for the communications is defined here. Port 80 is normal. Some systems use 8080. It is the same port used by the web browser.

4. ICM Discount - Your ICM discount is applied against the full price of your shipments, as documented on the manifest automatically when funds are drawn from your corporate account. You will also be able to run reports showing your adjusted postage after discounts have been applied.

NOTE: At this time, Global Express is not supported if the DAZZLE interface is enabled.

Using Global Express Mail Manifesting

1. When creating a package, select the 'International' address type at the top of the entry screen or select an International address from your address book.

2. Enter the address where the package is going. Make sure to select a destination country from the pull-down list. If using ODBC connect, the country name in the customer's database must match our country name exactly. We can provide a CSV file of valid country info for your Order Database Application. If you don't use it, you will need to select the country from our pull-down list..

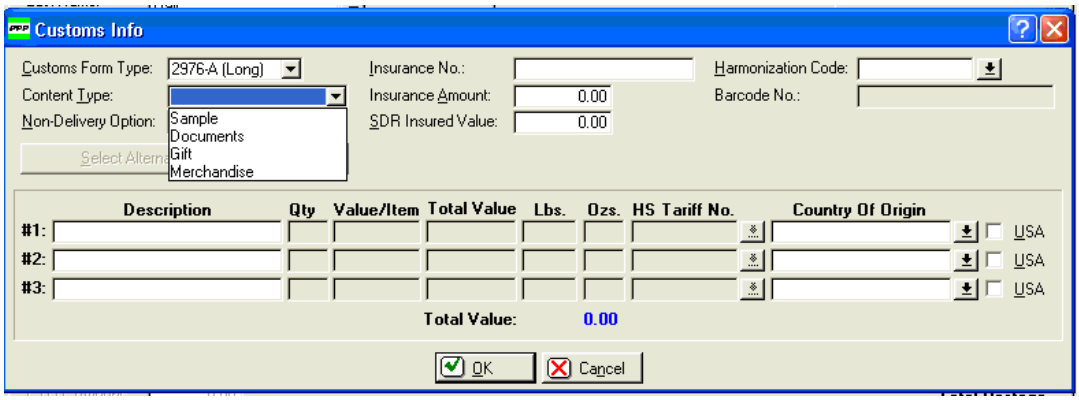
3. Select the correct Processing Category and enter or weight the package. ***Special Note:*** This ***must*** be done before pushing the Select Rate button!!!!

4. Press the Select Rate Button. You will see the rate for this package. We strongly recommend you also look at the info in the Prohibitions and Exclusions tabs of this screen before pressing the Select Button.

5. Fill in any of the optional fields in the upper right of the screen (Package ID, Private Insurance, Description, Department Code, etc.)

6. Press the Customs Info button, if you would like PPP to print your Customs Form for you. It is not required that you do this step in order to create an International Package. If you don't fill out this section, your Customs Form will simply not print.

a. Choose the "Customs Form Type". Typically, the 2976 Form is used for packages with a value of under $400 and the 2976-A Form is used for packages with a value of over $400.

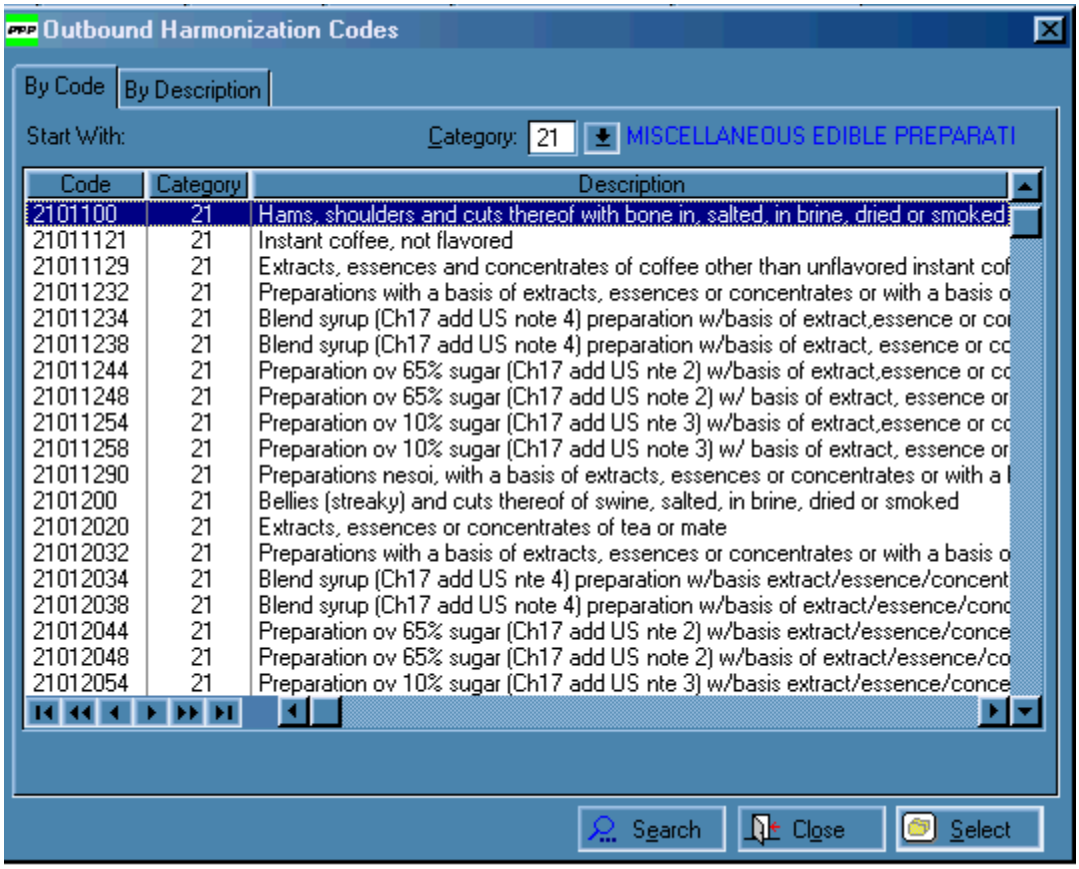


b. Select the content type (Sample, Documents, Gift, Merchandise). Select the Non-delivery option (Return, Redirect, Abandon). If you choose Redirect, you must press the Select Alternative Return Address

and select the return address in our RTA file that you wish the product to be returned to if undeliverable.

c. When the Customs form prints you will see spaces for insurance, but USPS insurance on International mailings is not currently available. If you would like to insure your International Packages, you will want to use a third-party insurance company, such as U-PIC. See the section on "Using Private Insurance" in the "Using Postal Package Partner" Section for Details on setting this up.

c. If you are using the 2976-A Form, enter the Harmonization Code from the pull-down menu. The Harmonization Code is not required for the 2976 Form.


Outbound Harmonization Codes
By Code
By Description
Start With:
Category: 21
MISCELLANEOUS EDIBLE PREPARATI
Code
Category
Description
2101100 21 Hams, shoulders and cuts thereof with bone in, salted, in brine, dried or smoked
21011121 21 Instant coffee, not flavored
21011129 21 Extracts, essences and concentrates of coffee other than unflavored instant cof
21011232 21 Preparations with a basis of extracts, essences or concentrates or with a basis o
21011234 21 Blend syrup (Ch17 add US note 4) preparation w/basis of extract,essence or cor
21011238 21 Blend syrup (Ch17 add US note 4) preparation w/basis of extract, essence or co
21011244 21 Preparation ov 65% sugar (Ch17 add US nte 2) w/basis of extract,essence or co
21011248 21 Preparation ov 65% sugar (Ch17 add US note 2) w/ basis of extract, essence or
21011254 21 Preparation ov 10% sugar (Ch17 add US nte 3) w/basis of extract,essence or co
21011258 21 Preparation ov 10% sugar (Ch17 add US note 3) w/ basis of extract, essence or
21011290 21 Preparations nesoi, with a basis of extracts, essences or concentrates or with a
2101200 21 Bellies (streaky) and cuts thereof of swine, salted, in brine, dried or smoked
21012020 21 Extracts, essences or concentrates of tea or mate
21012032 21 Preparations with a basis of extracts, essences or concentrates or with a basis o
21012034 21 Blend syrup (Ch17 add US nte 4) preparation w/basis extract/essence/concent
21012038 21 Blend syrup (Ch17 add US note 4) preparation w/basis of extract/essence/conc
21012044 21 Preparation ov 65% sugar (Ch17 add US nte 2) w/basis extract/essence/conce
21012048 21 Preparation ov 65% sugar (Ch17 add US note 2) w/basis of extract/essence/co
21012054 21 Preparation ov 10% sugar (Ch17 add US nte 3) w/basis extract/essence/conce
Search
Close
Select

There are more than 11,000 codes to choose from. The easiest way to find one is to press the Search button, enter a single keyword in the screen that pops up and press the Search button on that screen. You will get a list of all harmonization codes that contain that keyword. Pick the one that best fits the description of what you are selling. You can also select a category and view all items for a specific category. Be careful to check the Prohibitions and Exclusions to make sure the product you are shipping is not prohibited in the country you are

shipping to. This harmonization code acts as a default for the line items.

Note: The barcode number used on the customs form is not assigned until the form is first printed.

d. Fill in up to three line items. That is the maximum number of items supported by the USPS Customs Form API. If you are shipping more than three items, you will need to fill out the Custom Form manually.

i. Enter the description of the item followed by the quantity, the value in US FUNDS per item… Then fill in the weight of the item in pounds and ounces. The weight of all items in the package can not exceed the weight of the package but can be less.

ii. Enter the country of origin for the item. If the item you are shipping was made in Japan, than the country of origin is Japan, not the USA where you shipped it from. If the Origin is USA, just check the USA checkbox. If the country of Origin is not the USA, press the lookup button to select the country.

iii. Repeat A & B for the two additional line items if necessary.

e. Click on OK to return to the Shipping Screen then press Print and Save.

10. The shipping label will now print and look like this:

Window Book
300 Franklin St.
Cambridge, MA 02139

EXPRESS MAIL
U.S. POSTAGE PAID
EXPRESS MAIL
CORP ACCT
112455

Pkg ID: [redacted]44
Package No.: 1 Of: 1
SHIP DATE: 03/04/2004

EMS

UNITED STATES POSTAL SERVICE TM

SHIP TO:
Jay Hall
16 ERDMONT CLOSE
CRAYFORD, KENT DA14RU
England

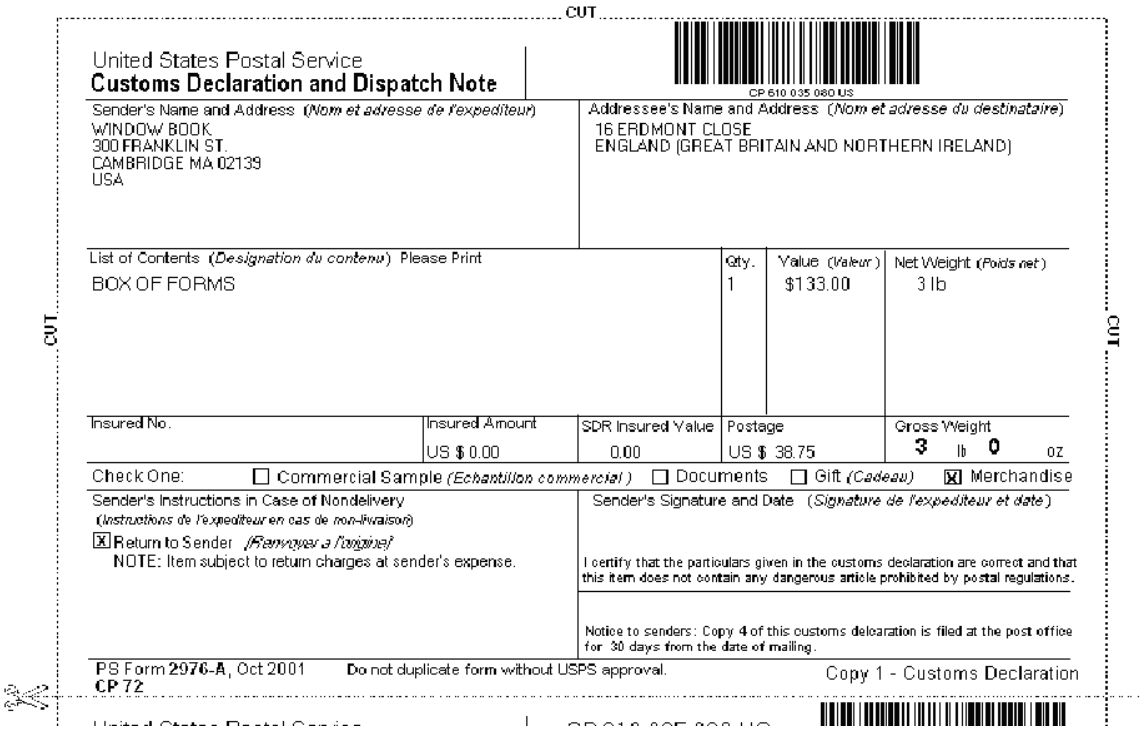
USPS EXPRESS MAIL

EA000000819US

11. The Customs Form will now print. Five copies of the Form will print on the report printer, which must be signed and dated by the shipper. The Forms must be (cut if using the 2976 Form...Folded in half if using the 2976-A Form and then placed in a 2976-E envelope, which is affixed to the package and envelope. If this is a commercial shipment, a copy of the commercial invoice must also be place in the envelope along with the customs form.

If you print a high volume of forms, you may not like signing all copies. If this is the case, you could use Appleton Zero Form carbonless paper, which will allow you to sign just the top copy after the form has been correlated.

A sample of what the Customs Form looks like is below:



CUT

United States Postal Service
Customs Declaration and Dispatch Note

CP 610 035 080 US

Sender's Name and Address (*Nom et adresse de l'expediteur*)
WINDOW BOOK
300 FRANKLIN ST.
CAMBRIDGE MA 02139
USA

Addressee's Name and Address (*Nom et adresse du destinataire*)
16 ERDMONT CLOSE
ENGLAND (GREAT BRITAIN AND NORTHERN IRELAND)

List of Contents (*Designation du contenu*) Please Print	Qty.	Value (*Valeur*)	Net Weight (*Poids net*)
BOX OF FORMS	1	$133.00	3 lb

Insured No.	Insured Amount	SDR Insured Value	Postage	Gross Weight
	US $ 0.00	0.00	US $ 38.75	3 lb 0 oz

Check One: ☐ Commercial Sample (*Echantillon commercial*) ☐ Documents ☐ Gift (*Cadeau*) ☒ Merchandise

Sender's Instructions in Case of Nondelivery
(*Instructions de l'expediteur en cas de non-livraison*)
☒ Return to Sender (*Renvoyer a l'origine*)
NOTE: Item subject to return charges at sender's expense.

Sender's Signature and Date (*Signature de l'expediteur et date*)
I certify that the particulars given in the customs declaration are correct and that this item does not contain any dangerous article prohibited by postal regulations.

Notice to senders: Copy 4 of this customs delcaration is filed at the post office for 30 days from the date of mailing.

PS Form 2976-A, Oct 2001 Do not duplicate form without USPS approval. Copy 1 - Customs Declaration
CP 72

CUT

International Manifesting

Setting Up International Mail Manifesting

Prerequisites

- The International Manifesting Registration option enabled
- Full time Internet Connection with port 80 or 8080 open
- Must go through International Manifesting application process and indicate the International Classes of Mail that you will be shipping (Global Piority, Airmail Parcel Post, Airmail Letter-Post, Economy Parcel-Post, Economy Letter-Post). Must also submit Manifest samples and sample labels.

Mailer Configuration Settings

1. Printers - Make sure report printer is selected. Currently the Customs Form Printer is just for Laser Substrates forms that are still used with APO/FPO shipments.

2. Communications/E-Mail - Press the Customs Form Settings checkbox and make sure Test Mode checkbox is checked while testing but unchecked when customer goes live. Also the port for the communications is defined here. Port 80 is normal. Some systems use 8080. It is the same port used by the web browser.

NOTE: At this time, International Mail is not supported if the DAZZLE interface is enabled.

Hand-Entering International Packages

1. When creating a package, select the 'International' address type at the top of the entry screen or select an International address from your address book.

2. Enter the address where the package is going. Make sure to select a destination country from the pull-down list. If using ODBC connect, the country name in the customer's database must match our country name exactly. We can provide a CSV file of valid country info for your Order Database Application. If you don't use it, you will need to select the country from our pull-down list..

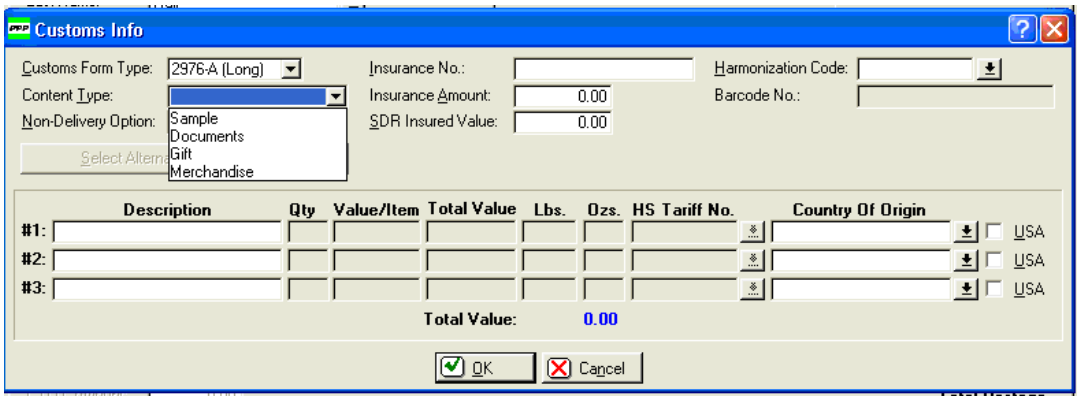
3. Select the correct Processing Category and enter or weight the package. ***Special Note:*** This ***must*** be done before pushing the Select Rate button!!!!

4. Press the Select Rate Button. You will see the rate for this package. We strongly recommend you also look at the info in the Prohibitions and Exclusions tabs of this screen before pressing the Select Button.

5. Fill in any of the optional fields in the upper right of the screen (Package ID, Private Insurance, Description, Department Code, etc.)

6. Press the Customs Info button, if you would like PPP to print your Customs Form for you. It is not required that you do this step in order to create an International Package. If you don't fill out this section, your Customs Form will simply not print.

a. Choose the "Customs Form Type". Typically, the 2976 Form is used for packages with a value of under $400 and the 2976-A Form is used for packages with a value of over $400.

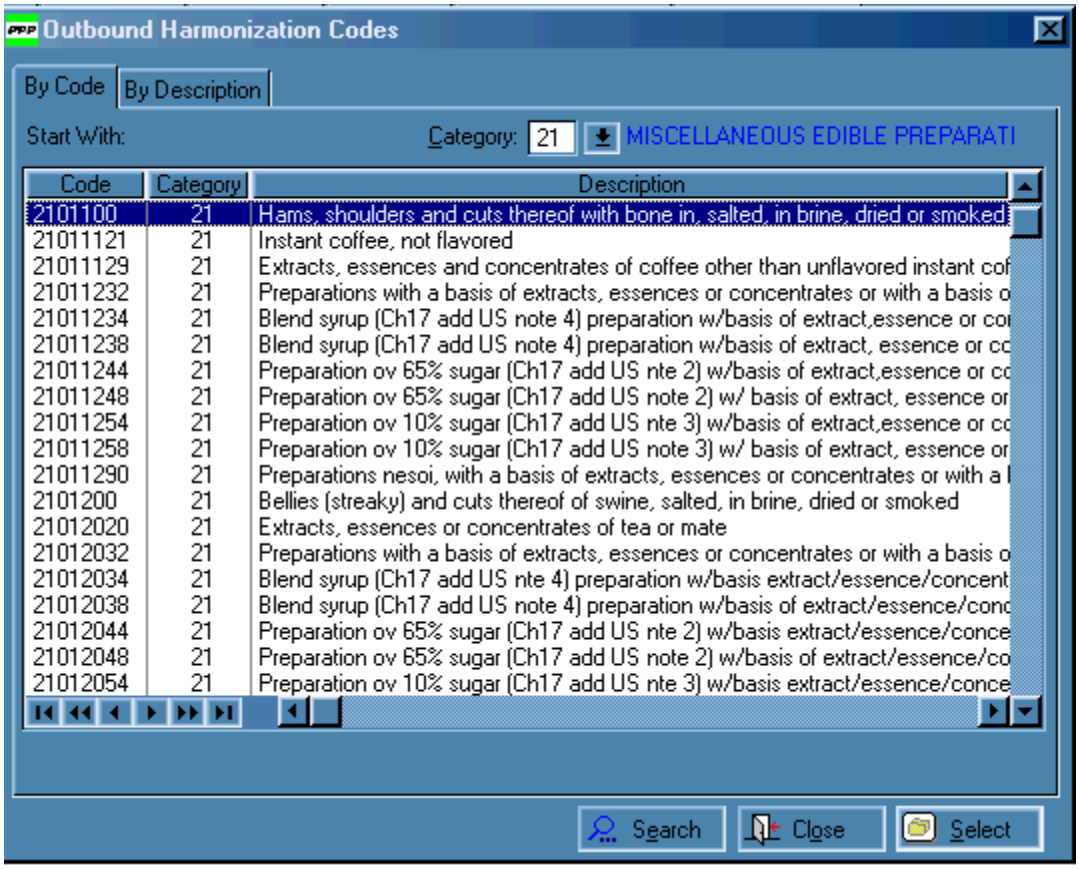


b. Select the content type (Sample, Documents, Gift, Merchandise). Select the Non-delivery option (Return, Redirect, Abandon). If you choose Redirect, you must press the Select Alternative Return Address

and select the return address in our RTA file that you wish the product to be returned to if undeliverable.

c. When the Customs form prints you will see spaces for insurance, but USPS insurance on International mailings is not currently available. If you would like to insure your International Packages, you will want to use a third-party insurance company, such as U-PIC. See the section on "Using Private Insurance" in the "Using Postal Package Partner" Section for Details on setting this up.

c. If you are using the 2976-A Form, enter the Harmonization Code from the pull-down menu. The Harmonization Code is not required for the 2976 Form.


Outbound Harmonization Codes
By Code
By Description
Start With:
Category: 21
MISCELLANEOUS EDIBLE PREPARATI
Code
Category
Description
2101100 21 Hams, shoulders and cuts thereof with bone in, salted, in brine, dried or smoked
21011121 21 Instant coffee, not flavored
21011129 21 Extracts, essences and concentrates of coffee other than unflavored instant cof
21011232 21 Preparations with a basis of extracts, essences or concentrates or with a basis o
21011234 21 Blend syrup (Ch17 add US note 4) preparation w/basis of extract,essence or cor
21011238 21 Blend syrup (Ch17 add US note 4) preparation w/basis of extract, essence or co
21011244 21 Preparation ov 65% sugar (Ch17 add US nte 2) w/basis of extract,essence or co
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2101200 21 Bellies (streaky) and cuts thereof of swine, salted, in brine, dried or smoked
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21012044 21 Preparation ov 65% sugar (Ch17 add US nte 2) w/basis extract/essence/conce
21012048 21 Preparation ov 65% sugar (Ch17 add US note 2) w/basis of extract/essence/co
21012054 21 Preparation ov 10% sugar (Ch17 add US nte 3) w/basis extract/essence/conce
Search
Close
Select

There are more than 11,000 codes to choose from. The easiest way to find one is to press the Search button, enter a single keyword in the screen that pops up and press the Search button on that screen. You will get a list of all harmonization codes that contain that keyword. Pick the one that best fits the description of what you are selling. You can also select a category and view all items for a specific category. Be careful to check the Prohibitions and Exclusions to make sure the product you are shipping is not prohibited in the country you are

shipping to. This harmonization code acts as a default for the line items.

Note: The barcode number used on the customs form is not assigned until the form is first printed.

d. Fill in up to three line items. That is the maximum number of items supported by the USPS Customs Form API. If you are shipping more than three items, you will need to fill out the Custom Form manually.

i. Enter the description of the item followed by the quantity, the value in US FUNDS per item… Then fill in the weight of the item in pounds and ounces. The weight of all items in the package can not exceed the weight of the package but can be less.

ii. Enter the country of origin for the item. If the item you are shipping was made in Japan, than the country of origin is Japan, not the USA where you shipped it from. If the Origin is USA, just check the USA checkbox. If the country of Origin is not the USA, press the lookup button to select the country.

iii. Repeat A & B for the two additional line items if necessary.

e. Click on OK to return to the Shipping Screen then press Print and Save.

10. The shipping label will now print.

11. The Customs Form will now print. Five copies of the Form will print on the report printer, which must be signed and dated by the shipper. The Forms must be (cut if using the 2976 Form...Folded in half if using the 2976-A Form and then placed in a 2976-E envelope, which is affixed to the package and envelope. If this is a commercial shipment, a copy of the commercial invoice must also be place in the envelope along with the customs form.

If you print a high volume of forms, you may not like signing all copies. If this is the case, you could use Appleton Zero Form carbonless paper, which will allow you to sign just the top copy after the form has been correlated.

A sample of what the Customs Form looks like is below:

CUT

United States Postal Service
Customs Declaration and Dispatch Note

CP 610 035 080 US

Sender's Name and Address (*Nom et adresse de l'expediteur*)
WINDOW BOOK
300 FRANKLIN ST.
CAMBRIDGE MA 02139
USA

Addressee's Name and Address (*Nom et adresse du destinataire*)
16 ERDMONT CLOSE
ENGLAND (GREAT BRITAIN AND NORTHERN IRELAND)

List of Contents (*Designation du contenu*) Please Print	Qty.	Value (*Valeur*)	Net Weight (*Poids net*)
BOX OF FORMS	1	$133.00	3 lb

Insured No.	Insured Amount	SDR Insured Value	Postage	Gross Weight
	US $ 0.00	0.00	US $ 38.75	3 lb 0 oz

Check One: ☐ Commercial Sample (*Echantillon commercial*) ☐ Documents ☐ Gift (*Cadeau*) ☒ Merchandise

Sender's Instructions in Case of Nondelivery
(*Instructions de l'expediteur en cas de non-livraison*)
☒ Return to Sender (*Renvoyer a l'origine*)
NOTE: Item subject to return charges at sender's expense.

Sender's Signature and Date (*Signature de l'expediteur et date*)
I certify that the particulars given in the customs declaration are correct and that this item does not contain any dangerous article prohibited by postal regulations.

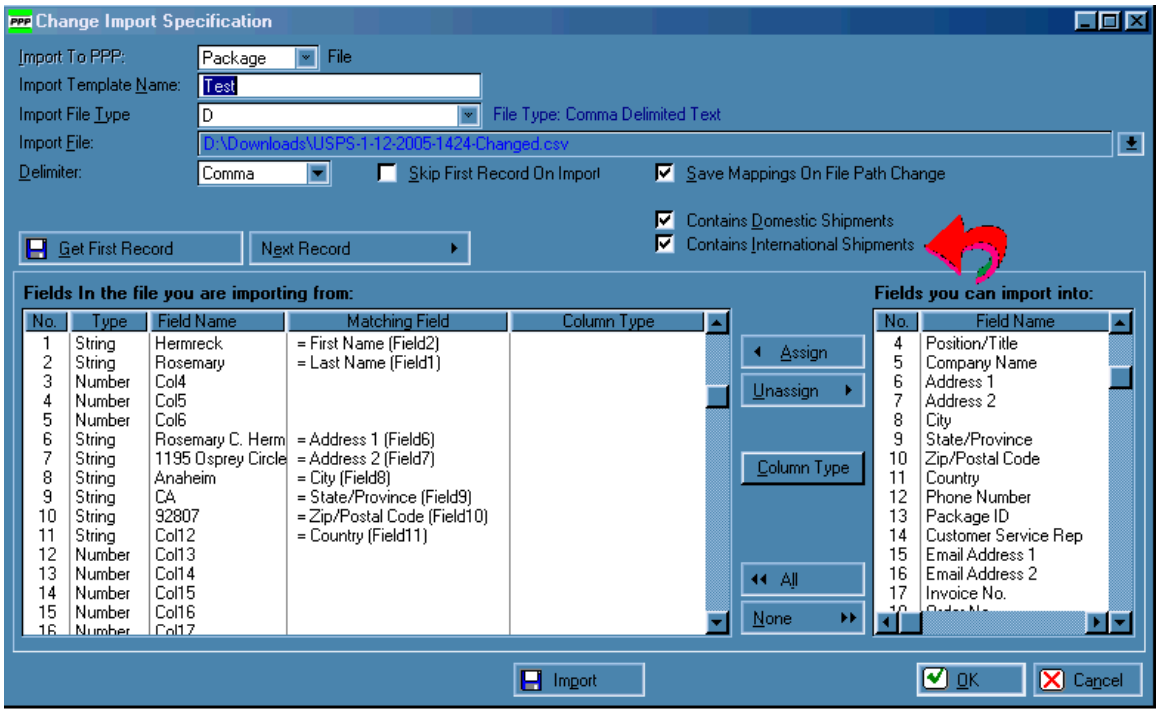
Notice to senders: Copy 4 of this customs delcaration is filed at the post office for 30 days from the date of mailing.

PS Form 2976-A, Oct 2001 Do not duplicate form without USPS approval. Copy 1 - Customs Declaration
CP 72

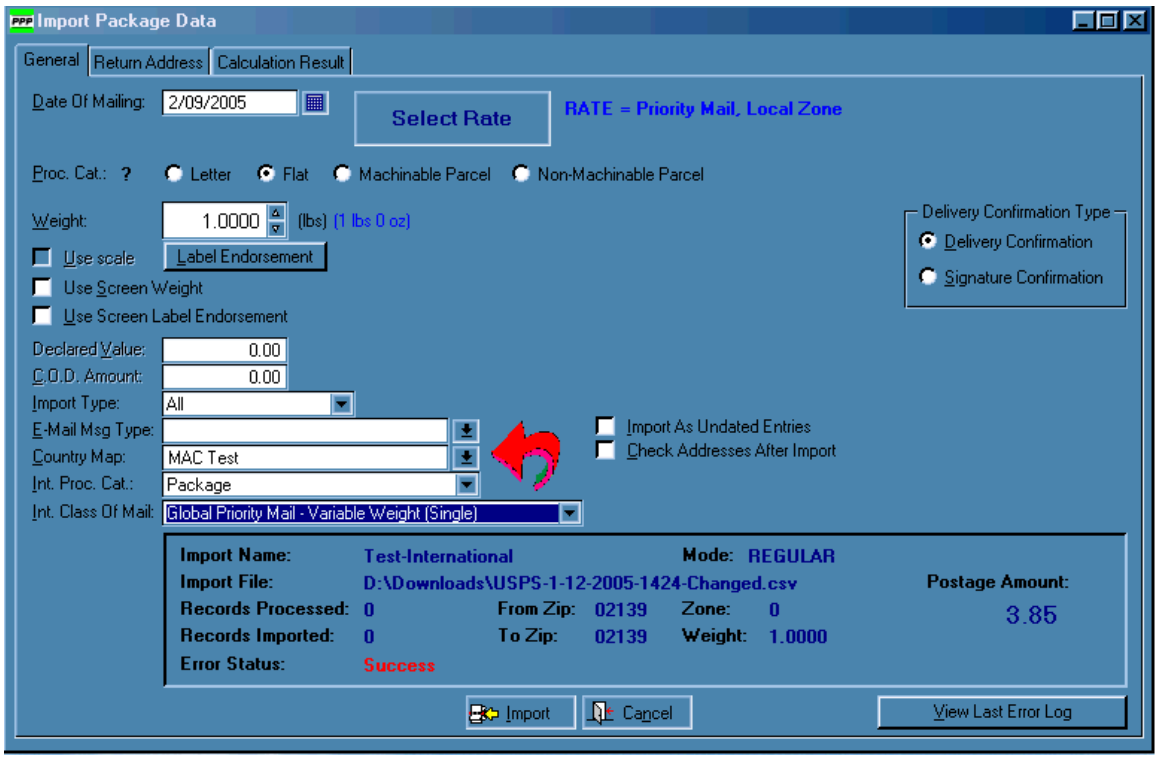
CUT

Importing International Packages

When creating or changing Import Templates, you will notice that there are 2 check boxes, which indicate if your file contains Domestic and/or International Shipments.



You will also notice that when you click on the "Import" Button on a Package Import, there is an additional section, where you will need to define how your International Packages are imported into PPP. You will want to be sure that you choose your International Processing Category and International Class of Mail before importing.


Import Package Data
General
Return Address
Calculation Result
Date Of Mailing:
2/09/2005
Select Rate
RATE = Priority Mail, Local Zone
Proc. Cat.: ?
Letter
Flat
Machinable Parcel
Non-Machinable Parcel
Weight:
1.0000
(lbs) (1 lbs 0 oz)
Use scale
Label Endorsement
Use Screen Weight
Use Screen Label Endorsement
Delivery Confirmation Type
Delivery Confirmation
Signature Confirmation
Declared Value:
0.00
C.O.D. Amount:
0.00
Import Type:
All
E-Mail Msg Type:
Country Map:
MAC Test
Int. Proc. Cat.:
Package
Int. Class Of Mail:
Global Priority Mail - Variable Weight (Single)
Import As Undated Entries
Check Addresses After Import
Import Name:
Test-International
Mode:
REGULAR
Import File:
D:\Downloads\USPS-1-12-2005-1424-Changed.csv
Postage Amount:
Records Processed:
0
From Zip:
02139
Zone:
0
Records Imported:
0
To Zip:
02139
Weight:
1.0000
3.85
Error Status:
Success
Import
Cancel
View Last Error Log

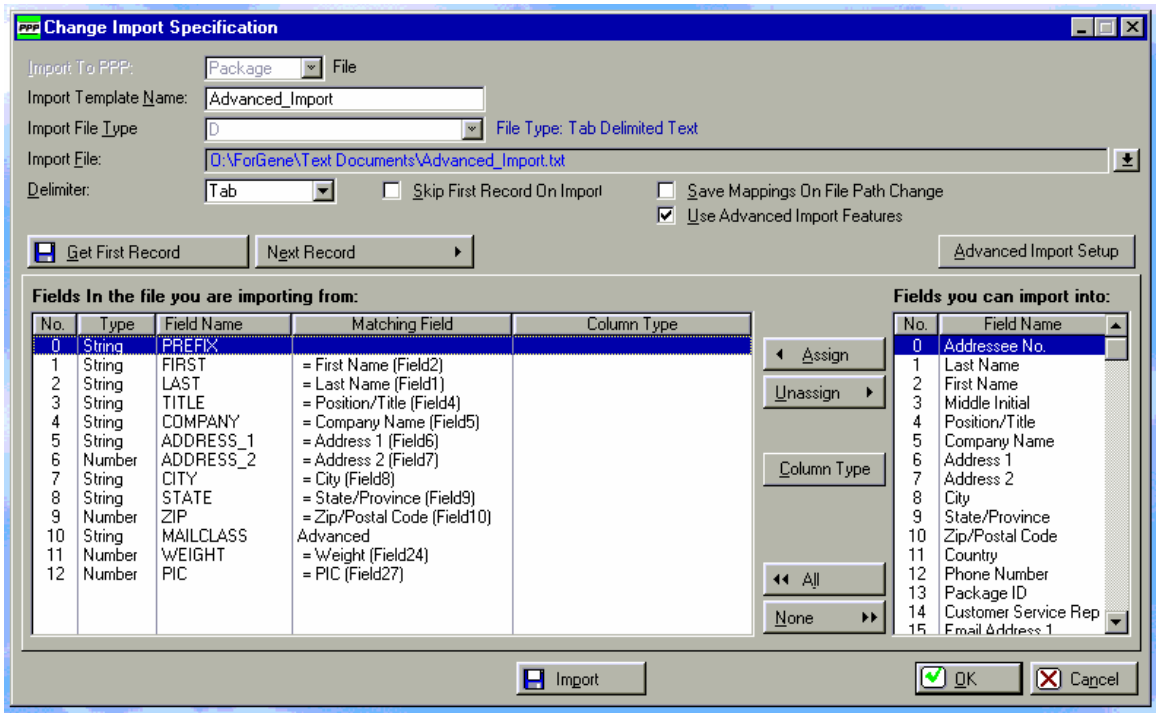
Advanced Connectivity

Advanced Multi-Class Import

Advanced Import -- This option is part of our Advanced Connectivity Module. It allows you to create parcel records for different mail classes with different special services.

To activate this feature, you must perform the following steps:

1. Click the 'Import/Export' button on the main Navigator Window
2. Click the 'Import' Data button
3. Click the 'Add' button on the Import Data screen
4. Complete the information required as if doing a Package Import
5. Check the 'Use Advanced Import Features' checkbox.



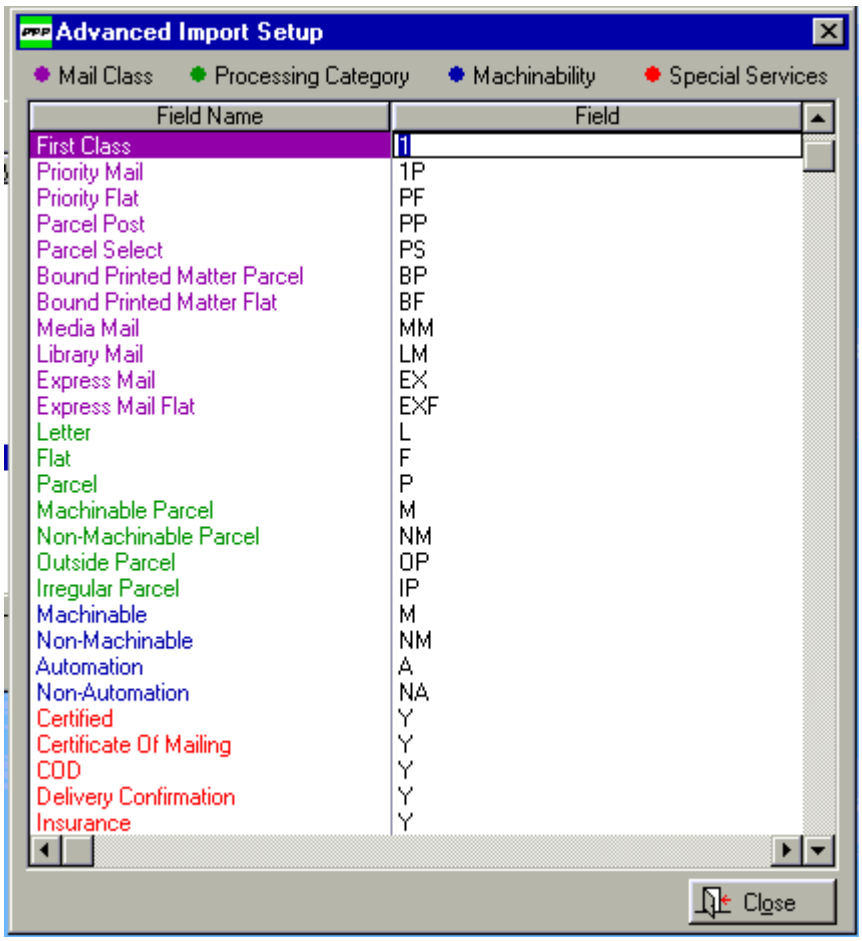
You will now have a number of new column types you can map:

Class of Mail - map this field to the import field that controls the class of mailing.
Processing Category - map this field to the import field that indicates whether you are shipping a letter, flat or parcel.
Machinability - this field is used to indicate if parcel is machinable or non-machinable

Balloon Rate (Priority and Parcel Services only) - indicates a parcel is > 84" and less than 108" in length and girth.
Oversize (Parcel Services only) - indicates the parcel is over 108" in length and girth.
Special Services - You can indicate the presence of any of the following special services by mapping these fields to a field that may contain a value to indicate the presence of that service. Some of these services will also require other fields to be populated:

- Certified
- Certificate of Mailing
- COD
- Delivery Confirmation
- Insurance - (must also populate COD Insured value (even if not COD)
- Recorded Delivery
- Registered - (must also populate COD Insured value (even if not COD)
- Restricted Delivery
- Return Receipt
- Return Receipt for Merchandise - (must also populate COD Insured value (even if not COD
- Signature Confirmation
- Special Handling

Press the Advanced Import Setup Button to get the definition screen where you can indicate which values are needed to trigger special services, oversize surcharges, etc.



In the case of Mail Class, one these values would be required in the 'Class of Mail' field which is mapped as a column type.

All the possible values for processing category are mapped next followed by the machinability fields.

The special service fields are different in that we are looking at individual status or 'flag' fields for each special service. For example, if you are mailing some pieces with Delivery Confirmation, some Signature Confirmation and some without any Confirmation Services, you would create two fields, one for Delivery Confirmation and the other for Signature Confirmation. If you define 'Y' as the "trigger" for the special service, when there is a "Y" in the Delivery Confirmation field we will generate a Delivery Conformation label. If the "Y" is in the Signature Confirmation field instead, we will generate a Signature Confirmation label. If neither have a "Y", the label will not contain any kind of Confirmation Services but if both are checked, we will generate and import error since the two services cannot be used at the same time. You will have to edit the record and decide which of the two services you will use before we allow you to print a label.

Import Agent

Overview of Import Agent

The Import Agent is part of Postal Package Partner's Advanced Import Option, which also includes our multi-class import option and our upcoming ODBC connect feature that will let you look up order or customer information from other files via ODBC. The Import Agent allows close to real-time connectivity with any order entry or other program that can generate frequent exports of its shipping data.

How It Works

You will create an import definition in our import engine then go to Import Agent Setup to create an 'Agent' that will start looking for files to import. When a file is found meeting your naming specifications, the Agent will determine whether the file is currently being added to and if not, it will rename it, copy it to a temporary folder and import it. When the import is complete the file is moved to a storage folder and renamed to include the date and time.

If your program is constantly adding records to the same file, by renaming it when it is not being added to, your program will create a new file, which we will import later after the first one is imported and the other one has stopped growing for the required time interval. The temporary folder we copy the file to is the IAWORK folder under the Data folder and the archiving folder is IACOPY under the Data folder. We recommend you do not run the Import Agent on more than one computer at a time on your network though your Agent can be configured to look for multiple files in multiple folders. Future enhancements to the Import Agent will include "FTP Agent" which will allow you to look at the contents of FTP sites as well as local and network hard drives.Import Agent

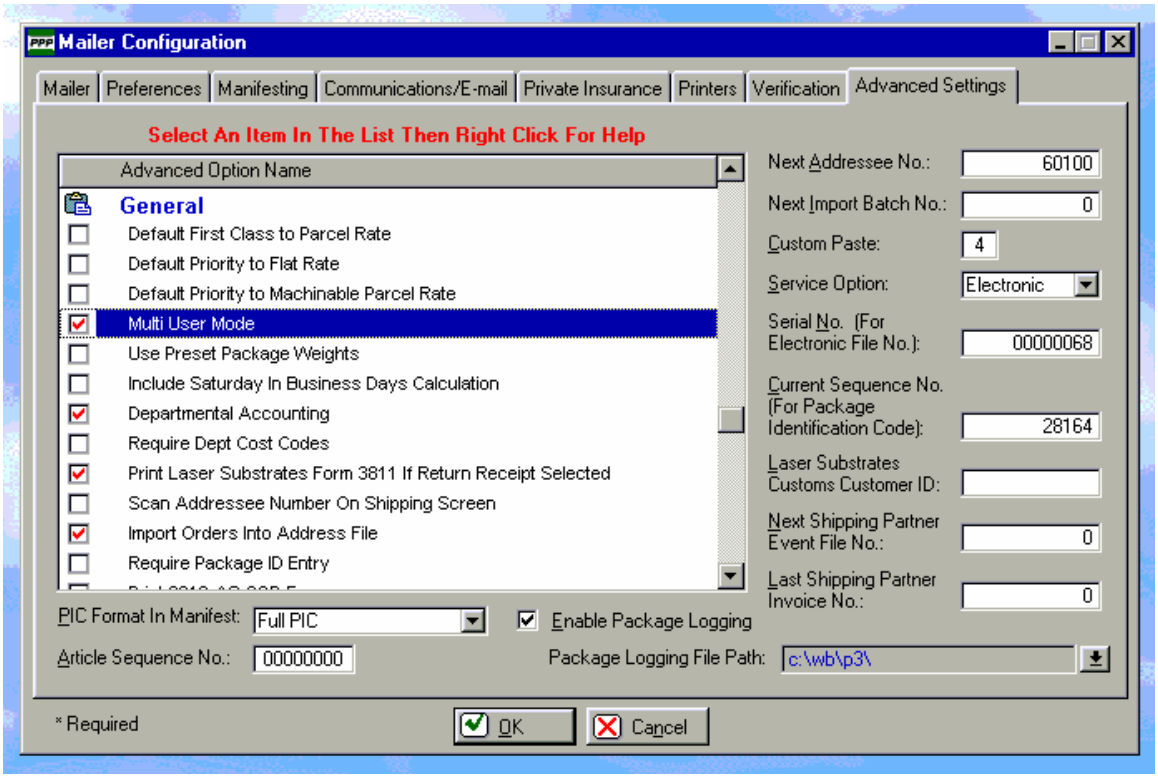
Using Import Agent

Create Import Template

Before you can configure the Import Agent to automatically import your data, you must first go to our Import program and configure the import you want to perform. You can setup any of our supported import types and can even use the Advanced Import setting within the Import Program to do Multi-Class imports. At the present time you cannot use queries with the Import Agent to select certain records for import. After you have tested your import definitions by successfully importing a test file, you are ready to setup the Import Agent.

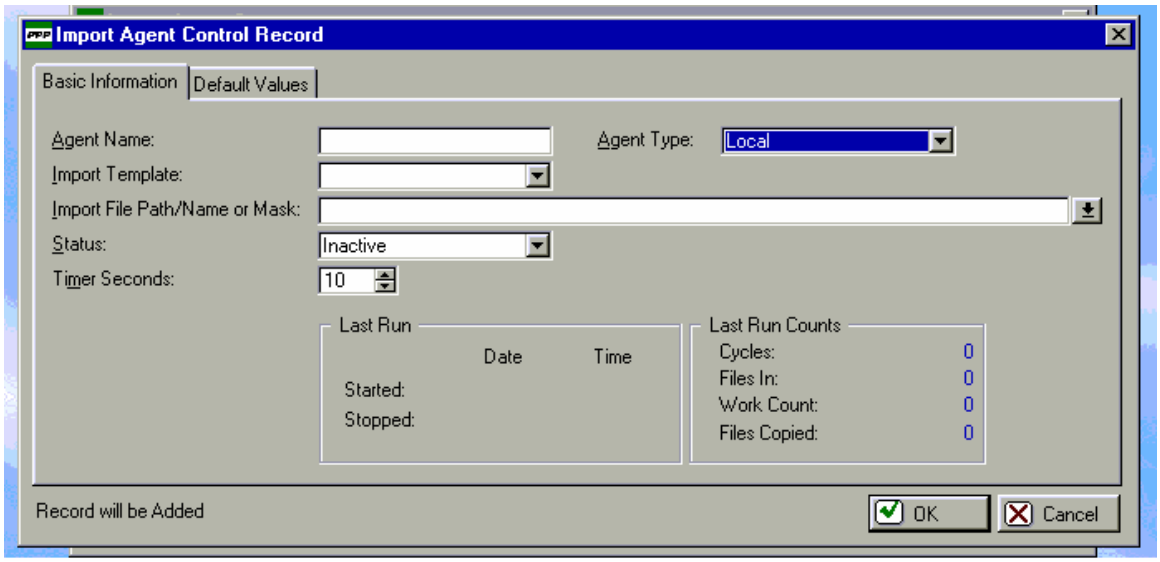
Mailer Configuration

Before using the Import Agent, we recommend you go into Mailer Configuration Screen (File => System Setup => Mailer Configuration); then go to the Advanced Settings tab and check the checkbox for 'Multi-user Mode'. This should be done even if you are on a single user workstation. What this does is redisplay your 'Print Labels' browse every 10 seconds. This way when the Import Agent imports new parcels you can see them almost right away.



Configure Import Agent

From the File Menu, select the Import Agent Setup option. You will get a list of all import definitions that have been configured for automatic import. Press the Insert Button to add a new import definition to the list.



Agent Name: Enter a name for this import 'agent'

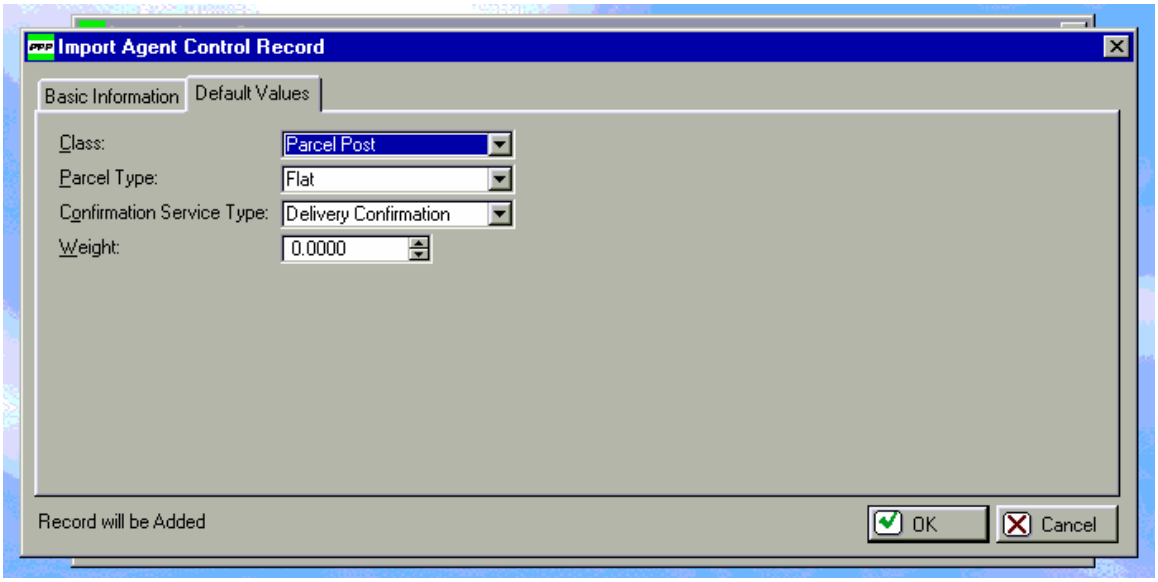
Import Template: Press the lookup button on the right side of this field to select an import definition. You can import into either the Package file or the Addressee/Order file depending on the settings in your import definition.

Import File Path/Name or Mask: By default, the file and path that was set in your import definition will be used. You can, however change this to a different path or even a different name that can include a "wild card". For example, if the program generating data for import is creating different file names, you could create a folder on your network that will only store those files and change the file name to *.*. This way, the Import Agent will attempt to import any file in that folder.

Status: This field will tell you whether the Import Agent is currently trying to import the files as defined by this definition. If Postal Package Partner is currently looking for files as defined in that record, it will say active. If you have told it to stop, it will say 'Stopping' and if the Import Agent is not being run at that moment, it will say 'Inactive'. You usually do not set this. It is set by the actions of the program itself.

Timer Seconds: This sets how often the Import Agent will look for new files. It also determines how long the file must be the same size before it is imported. The file must remain the same size for two cycles before it is imported. If the file you are importing is being very actively updated, you want to set a low value like 10 or 20 seconds. If the file is not updated that

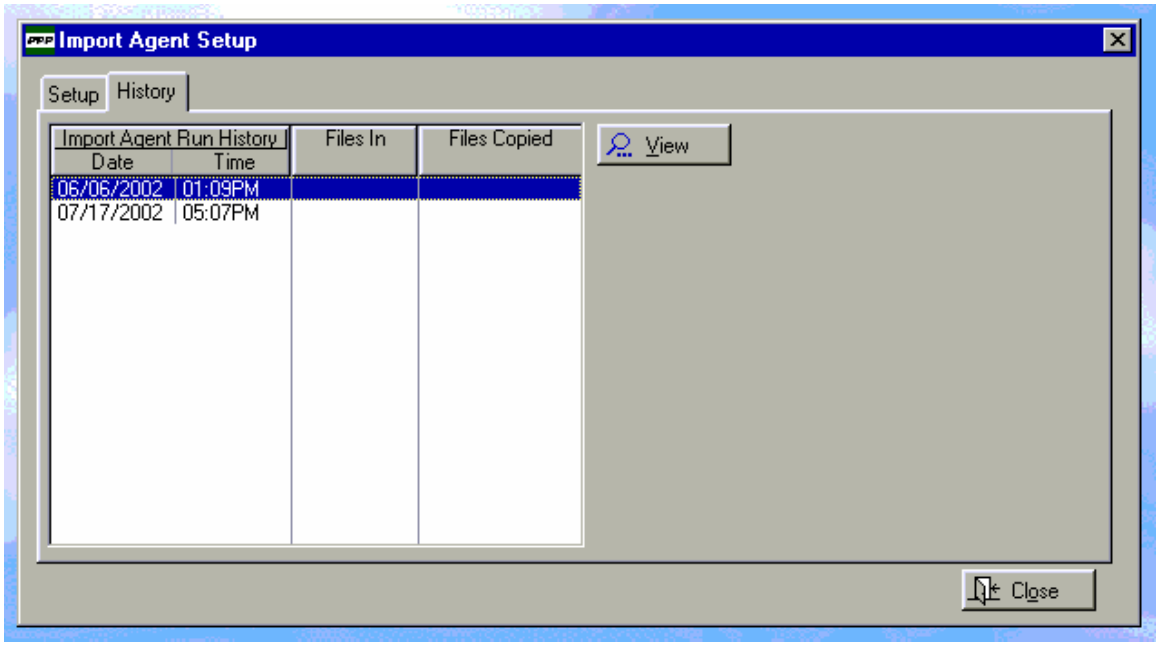
often 45 or 60 seconds would be OK.



Default Values: This tab allows you to set certain defaults if they are not imported through the Advanced Import option of the import engine. You can set the mail class, parcel type and Confirmation Service type. If you are NOT using our "Gold" version of Postal Package Partner, you can set a default weight, which would be used if you did not map the weight in the import definition. If you did map the weight, the imported weight would be used instead. The weight field will not appear in the Gold Version since parcels must be imported with a Zero weight and weighed according to postal regulations.

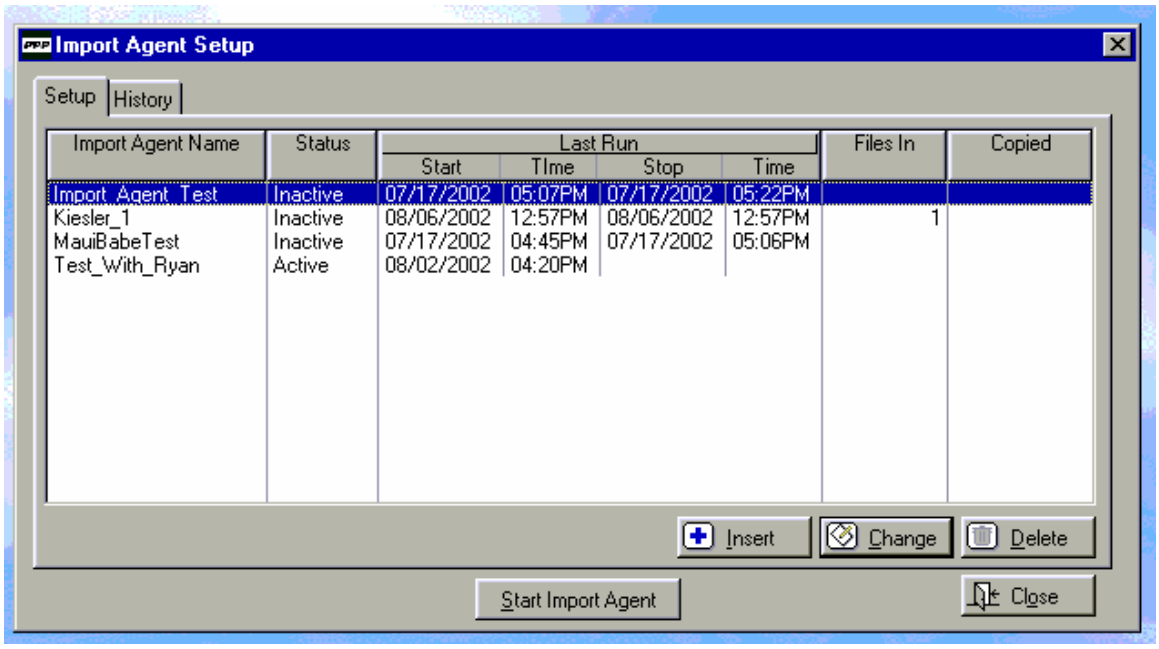
Note: Currently, parcel records imported with the Import Agent will bear the computer's date. After a parcel is imported it will marked for printing. Just press the Print button to print labels for all imported packages with labels be ready to printed.

Viewing Import History



When in the Import Agent Setup, you can view a log, which shows a list of each time the Import Agent was run for that configuration and how many files were imported in each session. The Files In column shows you how many files were found that matched the file name or file mask specified. Files copied indicate how many files were imported and copied to the storage folder.

Running the Import Agent



Press the Start Import Agent Button at the bottom of the Import Agent Setup Screen. The status of the definitions on the list will become 'Active'. You can then close the screen by pressing the Close button. You will see on your task bar a second Postal Package Partner icon. If you click on it, you will see how many cycles the agent has been active and how many import files are the various paths involved with the process.

Stopping the Import Agent

To stop the Import Agent, go to the task bar at the bottom of your screen, select the second PPP icon, which will display the screen that has a 'Stop Import Agent After the Next Cycle'. The Agent will not stop until it has finished processing all files that have been copied to the work directory and until the current cycle is completed so there will be a time delay before the task disappears.

WARNING: Exiting Postal Package Partner without shutting off the Agent will not shut down the Import Agent. It will continue to look for files and import them even if Postal Package Partner is not running!

ODBC Connect

Overview of ODBC Connect

This feature is part of the $500 Advanced Connectivity Option which also includes the Import Agent and the Advanced multi-class/multi-special services import.

ODBC Connect is a Postal Package Partner option which allows it to access databases from other programs in real-time so that batch export/import processes can be eliminated. It is designed to allow a shipping workstation to access individual orders or customer data as packages need to be shipped.

To use ODBC Connect, your order entry or other software must store its data in files that are ODBC compliant. You can also build "views" of complex databases that Postal Package Partner can also access with ODBC Connect. Popular database formats like Access, Microsoft SQL Server, Oracle, DB2, dBase, Visual Foxpro and others have ODBC drivers that are either supplied with Windows or available from third party vendors. If you have an ODBC driver for your database you should check to be sure it is the most recent version.

ODBC Connect allows you to select and map up to two files: A Primary File such as an order, invoice or customer file and a Secondary file if all the data you need is not stored in the Primary file. Most commonly the secondary file is a client file when the shipping information needed for the label is not all present in the order or invoice file. You can define the field that joins the two files. The Secondary file can be in the same ODBC data source as the Primary File or a separate datasource.

Setting Up ODBC Connect

Define the ODBC Data Source

Before you can use ODBC Connect, you must define the data sources within Windows. The process for doing this is slightly different for each Windows version. The example shown below is for Windows 2000.

Go to Start => Settings => Control Panel.

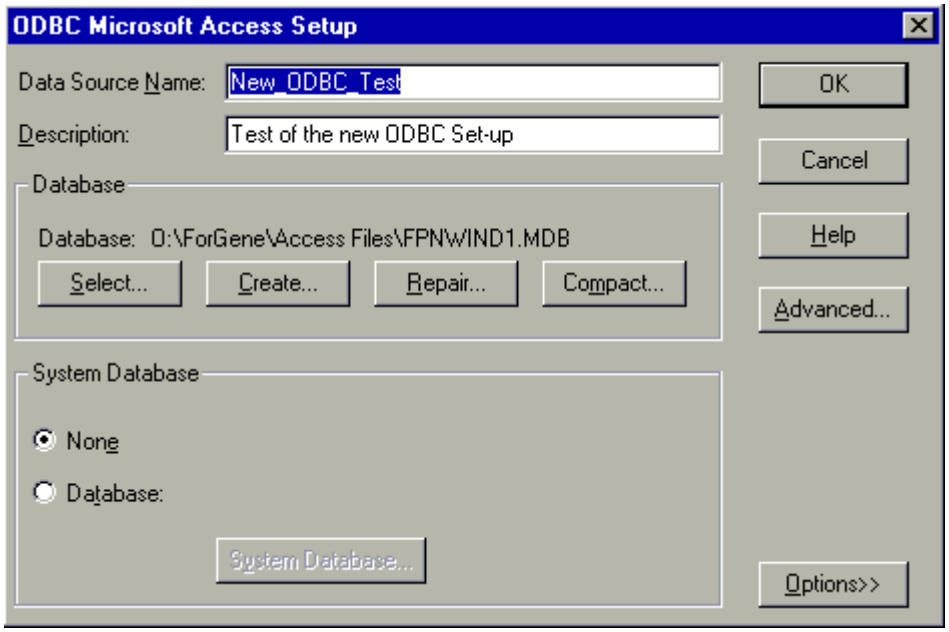
In some versions of Windows you will see an icon for 32 Bit ODBC Data Sources.

In Windows 2000 -> select Administrative Tools then ODBC Data sources.

Click on the System DSN Tab and press the ADD button.

View the list of available ODBC drivers and select the one that is for the files you are trying to access. If you don't know the name of the file or its file format, contact the vendor of your order entry or other software you are trying to get the data from and find out what the file and table names are you want and what the database format is of these files. Some database formats can hold multiple tables in a single physical file which is why you may need to know which tables in which files you will be accessing. If you do not have the appropriate ODBC driver for the database type used, your software vendor can either sell you one or direct you to companies that can provide the driver you need.

After you select the ODBC driver that corresponds to the file type you want to read, you will get this screen:

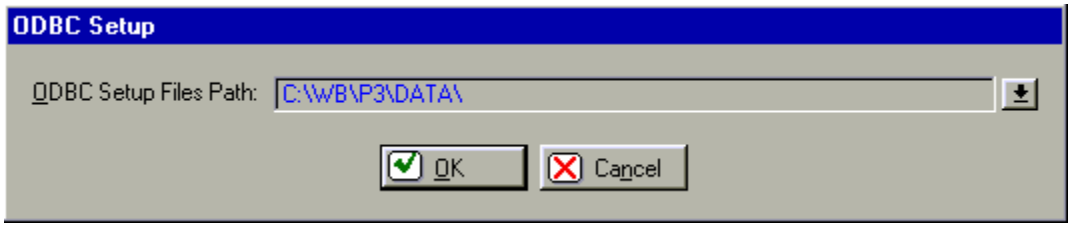


You should give this data source a name and enter it in the Data Source Name field then entry a description in the description field.

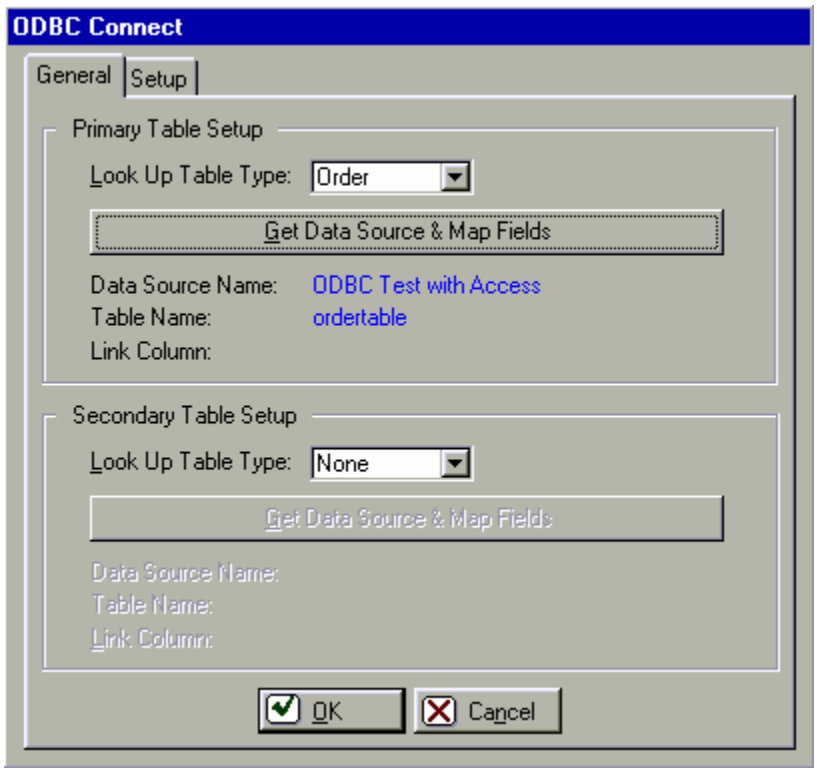
You would next press the Select Button in the Database section of the screen and select the database file you want to access. You do not need to worry about which table in the database you will be accessing at this point.
If you are going to access both the order file and customer file and they reside in different physical databases, you will need to create a different data source definition for each.

Configure ODBC Connect in PPP

Determine the path where the ODBC Connect Parameters will be stored. The default will be your data folder and no action is needed. If you are on a network this means that all workstations will use the same settings. This means that you must give your ODBC datasources the exact same name on each workstation. If for any reason you would rather have separate settings for each workstation, you can press the SETUP ODBC button on the preference screen and choose a folder on a local drive, preferably one that will get backed up occasionally.

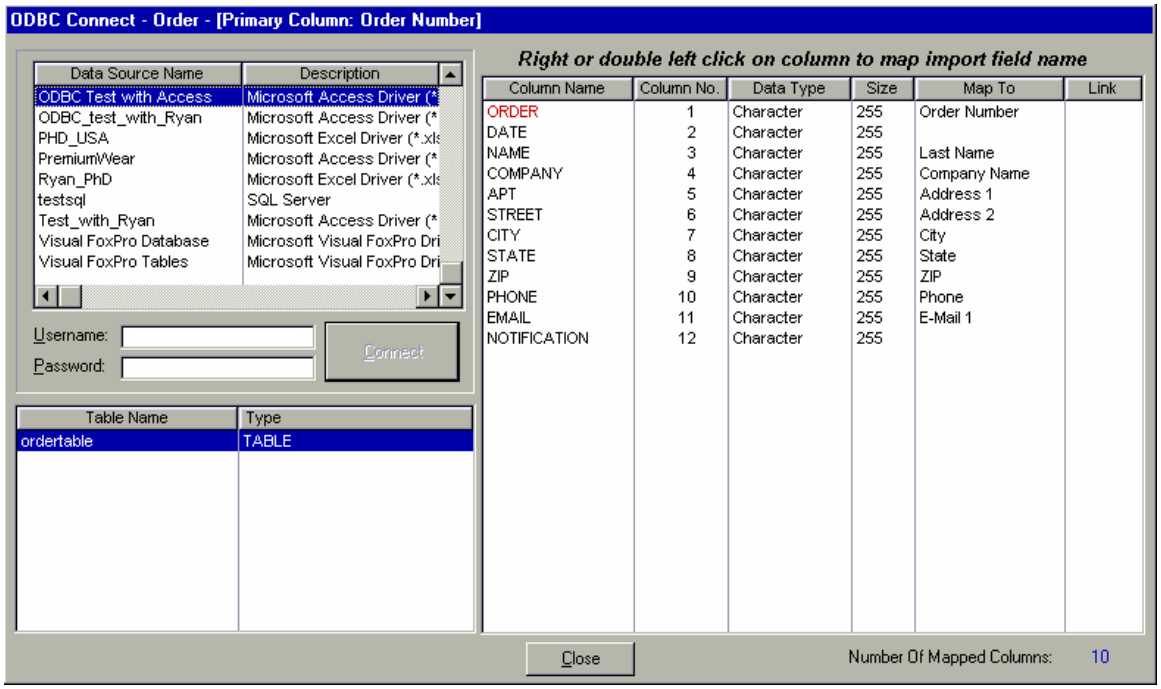


Define your Settings. Click on the ODBC Connect button in the Preference tab of the Mailer Configuration Screen.

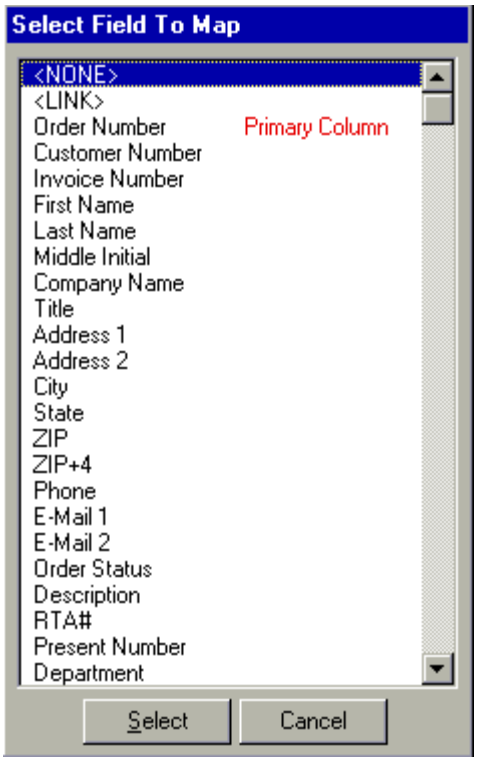


Select a Primary table type: You can look at a Customer table, Order table or Invoice table. Select the Data Source you want to use for the Primary table in the upper left of the screen and press the CONNECT button. The tables in the data source will appear on the lower left of the screen. You may need a user

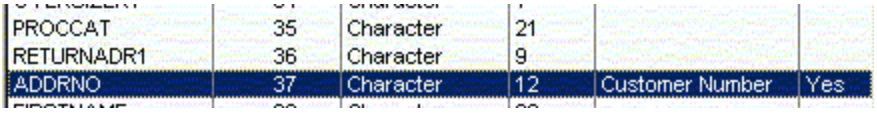
name and password to gain access to the datasource.



Choose the table you wish to use as your primary datasource in the lower left. The fields in that file should display on the right side of the screen. Map your fields to PPP fields. Highlight the primary lookup field. This would be order number if an order table, invoice number if an invoice table or customer number if it is a customer table. RIGHT CLICK or DOUBLE CLICK your mouse to get a PPP field list. Select the one marked 'Primary Column'.



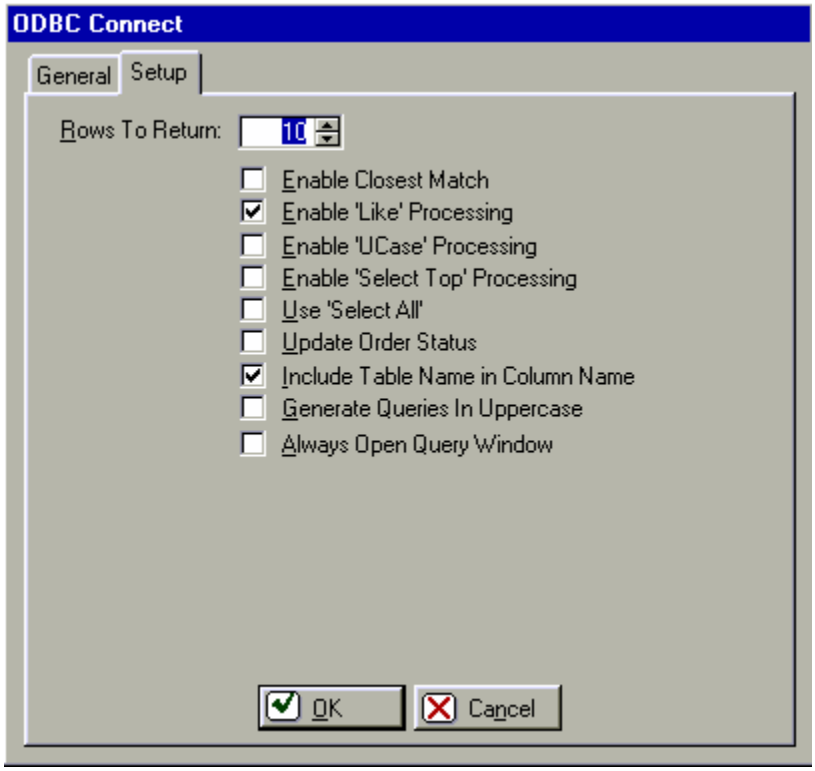
Repeat the right click mapping process until all fields you want to map are mapped. The values you map are displayed on the main mapping screen so you can see what you have mapped. If you make a mistake and map a field that you don't want to map, pop up the field list and select to eliminate a prior mapping. Some of the fields have special properties and requirements. Please see the notes below. If you plan to use a Secondary file, you must map the link field (usually some kind of customer number) to a PPP field, then map it again, this time selecting . Your mappings would look something like this:



Press the CLOSE button when done mapping your fields. Defining and Mapping a Secondary File. Retrieval Linked to Customer File – You will lookup the order information from the order file but get the shipping address from a linked customer file. You must have first defined the link field in the Primary file first. You would select the ODBC Source, enter the login and password if applicable, press the CONNECT button and select your secondary table just like you did for the primary table. Map the link field to the same PPP field you mapped the link field to in your primary file. Double or right click on that field to get the field list. Double or right click again on that field and select . You can now map the fields you need to get from your secondary file. Press OK when all fields are mapped.

See Notes on PPP Fields for details.
Setup Tab: Setting Your SQL Query Options -- After you have mapped all of your fields you will be back to the ODBC Connect screen which has a setup tab.

Click on the setup tab to set your SQL options:



See SQL Query Options for details.

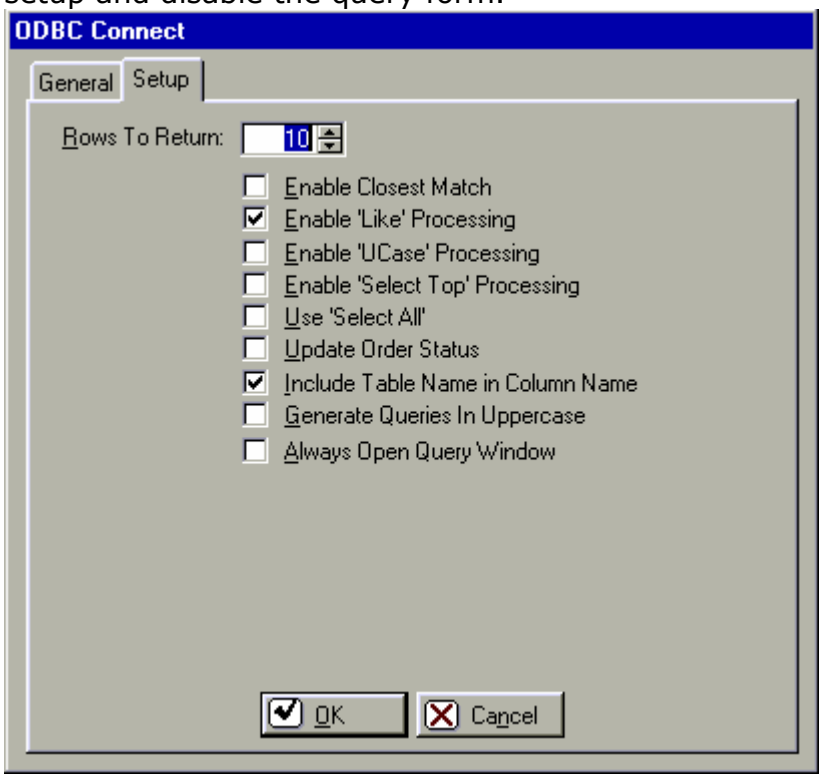
Notes on PPP Fields

Items that start with an "***** " do not apply to Postal Package Partner Gold.

ZIP Code - can accommodate 5 or 9 digit ZIP codes, with or without dashes
ZIP+4 - will get appended to Postal Package Partner's ZIP Code field
Description - up to 100 characters will print at the bottom of a 4 x 6 label
RTA# - This is the Return Addressee Number. You should map this only if you are using multiple return addresses.
***Preset Number** - If you are using presets for predetermined parcel weights and descriptions, this is the preset number you are using for that purpose. Currently, the description from the preset will be used if there is no other description. The weight will not be used from the preset file at this time
Dept No and SubDept - are used by PPP's departmental accounting system, if enabled
Package Weight - If mapped, the weight must be in pounds and you must turn off your scale interface if you want to use the mapped weights.
Class of Mail - If you map this field to control the class of mail you must use specific values to represent each class. We do not give you control over these values like we do in our Advanced Import. Here are the codes you would need to select each class:First Class1Priority1PPriority Flat Rate EnvelopePFParcel PostPP***** Bound Printed Matter ParcelBP***** Bound Printed Mater FlatBF***** Media MailMM***** Library MailLMExpress MailEXExpress Mail Flat Rate EnvelopeEF
Delivery Confirmation - If you have the Advanced parameter 'Disable Automatic Delivery Confirmation' set, you can put anything in this field to enable Delivery Confirmation.
Signature Confirmation - If you map this field and if there is anything in it, the piece will get Signature Confirmation.
Private Insurance - If there is anything in this field, the piece will have private insurance though you still have to enter an invoice number at the present time. You also have to have a declared value. If you also indicate COD, you will not have private insurance since your COD fee includes USPS insurance.
Declared Value - required for Private Insurance or COD.
***COD Amount** - if populated and mapped, the item will automatically be flagged for COD Delivery.

ODBC Setup Options

Doing a query on an ODBC data source involves creating SQL query statements. Different databases often require different SQL syntax to achieve the desired results. We have implemented some options that allow the user to optimize the SQL syntax for the file system they are using. These options appear in the ODBC setup, but you can also access them by pressing a button on a query form you can enable in the setup program. This way you can try the different options until you get the query to work then go back to setup and disable the query form.



You can set these in the ODBC Connect Setup Screen. These are used primarily for driving the query of the Customer File where we are likely to retrieve a number of records matching the search criteria. These options will make this a smoother process. If you are only accessing the Order file, these options are not likely to apply to you.

Rows to Return: If you are looking at non-unique data, there may be a number of records that may meet your query conditions. We will present a list of these records you can choose from. If you are retrieving from an order or invoice file, you will usually only get one record back from your query and in that case we don't even display a list. If you are retrieving customer info by name or parts of a name, you would get more records back. By restricting the number of records we show on the list, this improves the performance of the ODBC connect feature. We would recommend starting at 10 and only

increasing it if you need to see more items on the list of records returned.

Enable Closest Match: This retrieves any record for which primary column values are greater or equal to the search value. We shut this off for the order or customer number search on the shipping screen but turn it on for the last name and company lookups. So if you are looking for a last name of "Smith" their query will return the closest match:
where customermaster.lastname >= "Smith"
order by customermaster.last name
If 'Smith' is there that will be the first record returned. If not it will return the next closest match. This allows you to enter a partial value. You could enter 'Sm' and is 'Sm' is the only record with 'Sm' then 'Smith' will be returned.

Enable "Like" Processing: Allows the search for partial fragments like the first few characters of a company or last name. For example: where customermaster.lastname like 'Sm%' so the returned value must begin with the first letters matching the letters up to the percent sign. The user could do this: %mit% to get any string that contained 'mit' in the string.

Enable "U Case" Processing: Forces the query information to upper case so the query is not case sensitive. The queries for some ODBC drivers are not case sensitive anyway so this is sometimes not needed.

Enable "Select Top" Processing: We require you to select how many records you will retrieve if we have multiple matches. This restriction improves system performance. Normally we will return the first records we find that match the search criteria. This Select Top option returns the best matches.

Use "Select All": If this is checked the entire record is brought into memory instead of just the mapped fields. This can be helpful for troubleshooting but normally you would not need to check this option.

Update Order Status: If you want us to write back to the file with an indicator that the order was filled, check this box. You would have to map the PPP Order Status field for this to work. If the field PPP is mapped to is a text field large enough to store a date in the MM/DD/YYYY format, we update that field with the date the package was shipped. If it is not big enough, we update the field with a '1'.

Include Table Name in Column Name: Some ODBC drivers like text drives, require that the SQL syntax include the table name and the column name.

Generate Queries in Upper Case: Some ODBC drivers require the query syntax to all be in upper case. Check this if your file system is one of these.

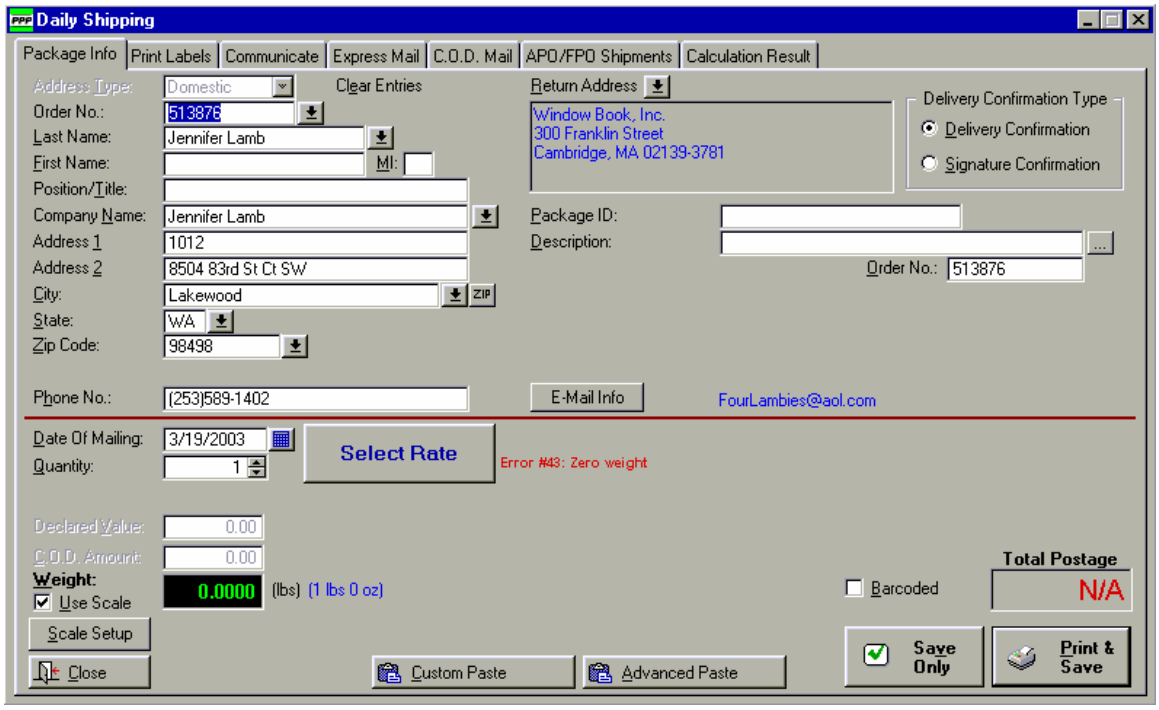
Always Open Query Window: This is a diagnostic tool if you are having

problems with ODBC Connect. Check this box. It will force a window to popup that has the SQL Query button on it that lets you see and alter the query we are sending to the ODBC driver.

Using ODBC Connect

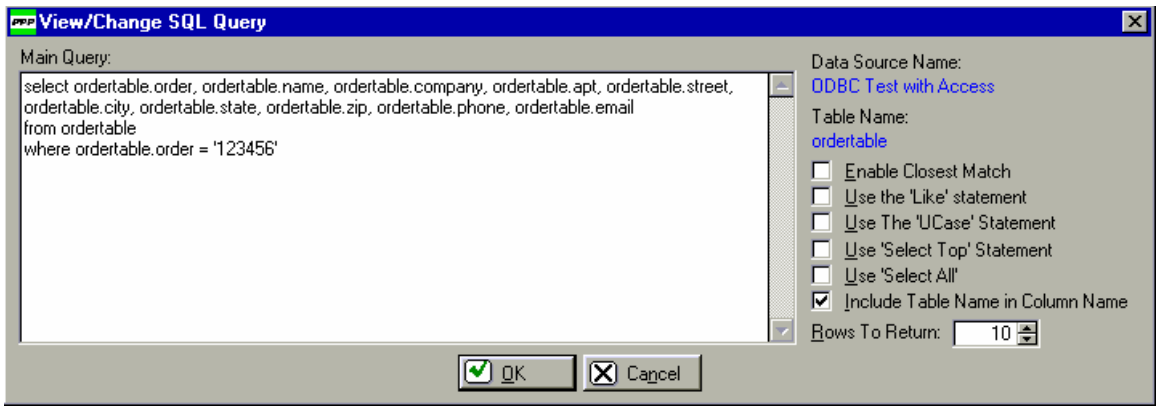
If you have configured ODBC Connect to retrieve an order or invoice, just enter the order number or invoice number into the field that will appear above the address and press TAB. If the order is found, you the information will be retrieved on the shipping screen. If there are multiple records found with that invoice or order number, you will get a list and can choose from the list. Both order numbers and invoice numbers can be alphanumeric.

If you are looking up a customer record, you can enter the customer number and press TAB or you can enter part of a last name or company name and press tab to get a list that match what you entered. You would then be able to select the correct customer. The SQL query options will control how many records we will allow you to review and how the queries are done.



Troubleshooting ODBC Connect

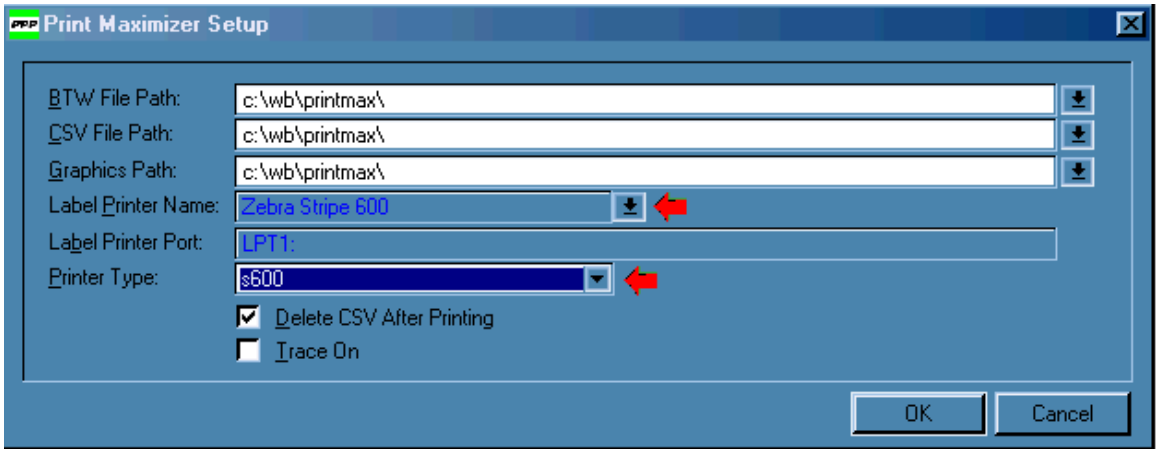
If you have problems retrieving your information, you should go to the ODBC Setup screen by pressing the ODBC Connect button in the Preferences tab of Mailer Configuration. Go to the Setup Tab and check the "Always Open Query Window" checkbox.
When you do the next query you will get a query form which has a View/Change SQL Syntax button. Press this button to see what we have generated for a query. You can override the setup options that are used to generate that code and rerun the query until you get the query to work.



PrntMax

There is a separate Installation CD that you will need to use in order to install the PrntMax Drivers & Fonts.

After you complete the installation, you will need to configure Postal Package Partner to use your printer name & printer type by going to File/System Setup/Print Maximizer Setup.



Multi-Permit/Multi-Manifest

Multi-Permit/Multi-Manifest Overview

Multi-Permit

Multi-Permit allows you to setup different permits from the Return Address Maintenance screen and associate a different permit to each return address. There will be a separate Manifest created for each permit mailed, based on the Return Address.

Multi-Manifest

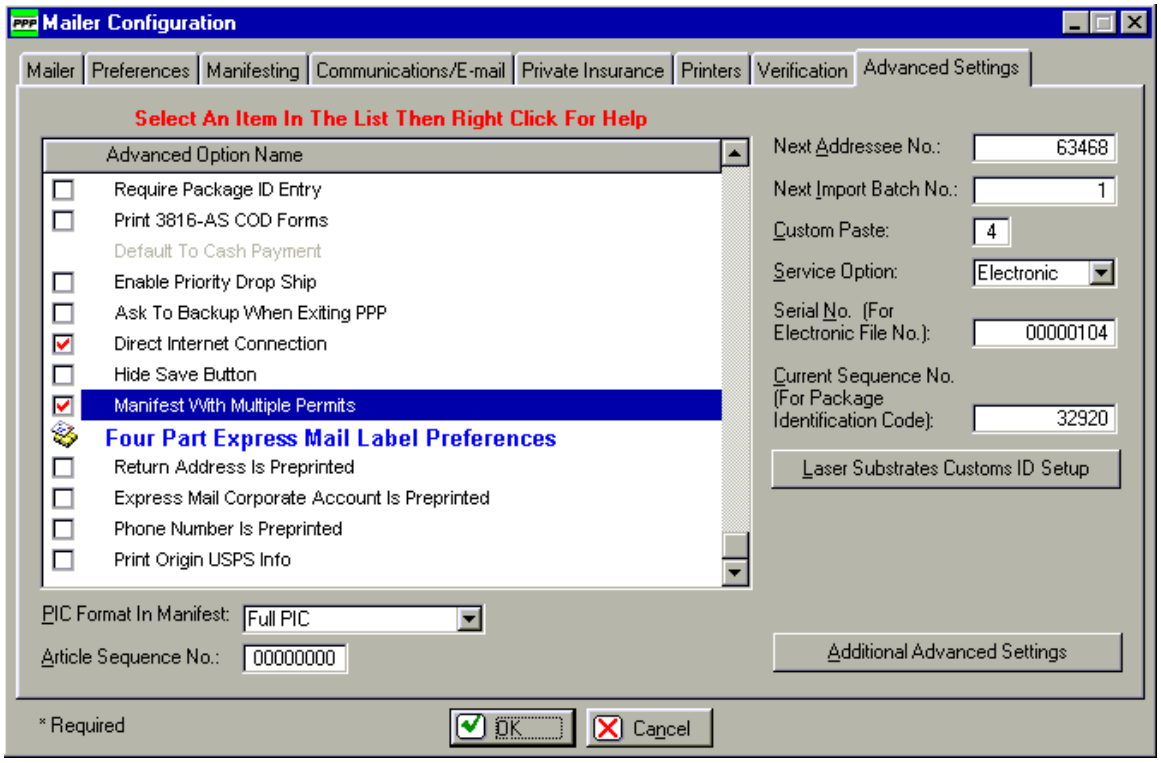
Multi-Manifest allows you to associate a manifest not only with a different permit but with different client or job data. You will want to use this feature if you are a Fulfillment House that does 'job oriented' Fulfillments as your Postage Statements will print your client, job and mailing agent data automatically.

You will also be able to direct different pieces to be on different manifests, which could be mailed on different dates or at different times.

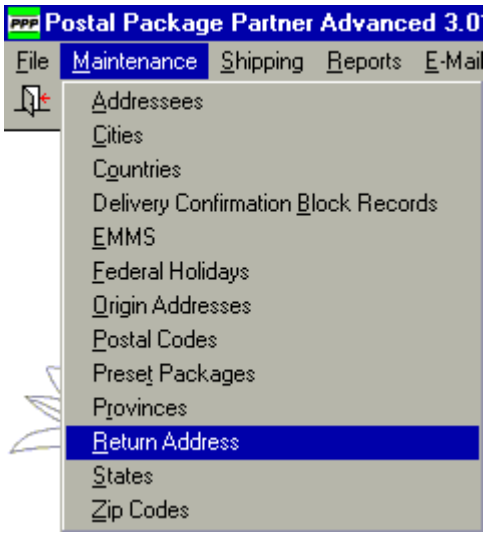
Using Multi-Permit

To configure Postal Package Partner to access multiple permits, follow the steps below:

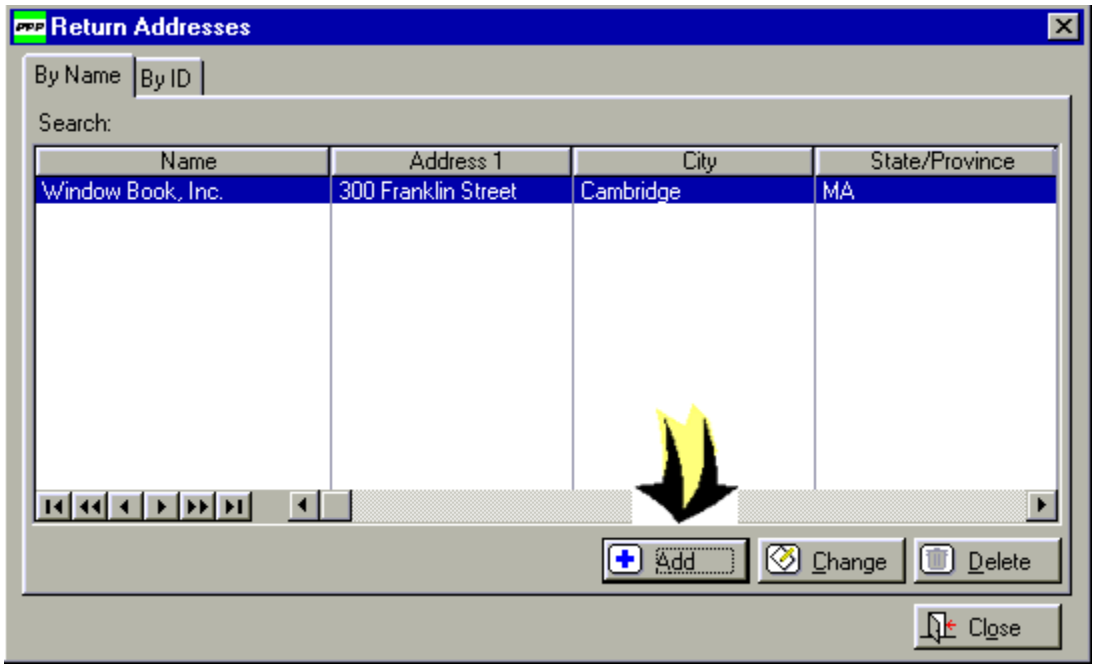
1. Go to File > System Setup > Mailer Configuration and click on the Advanced Settings tab. Check (double click) the "Manifest With Multiple Permits" checkbox at the bottom of the General Section and click the OK button.



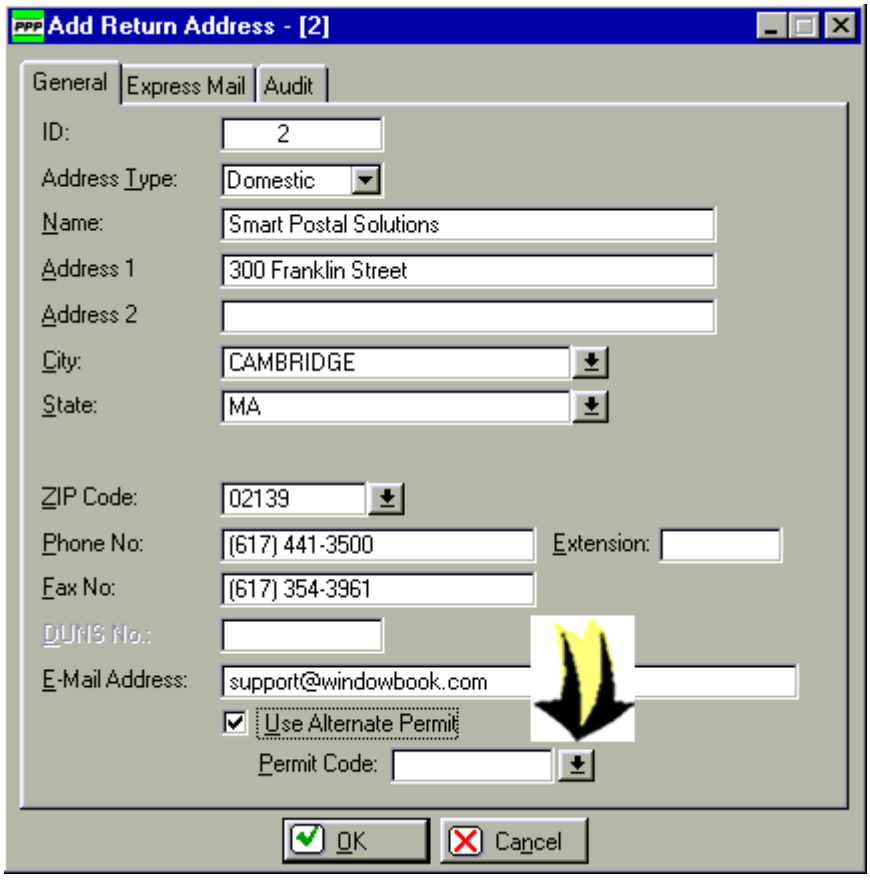
2. Go to Maintenance > Return Address



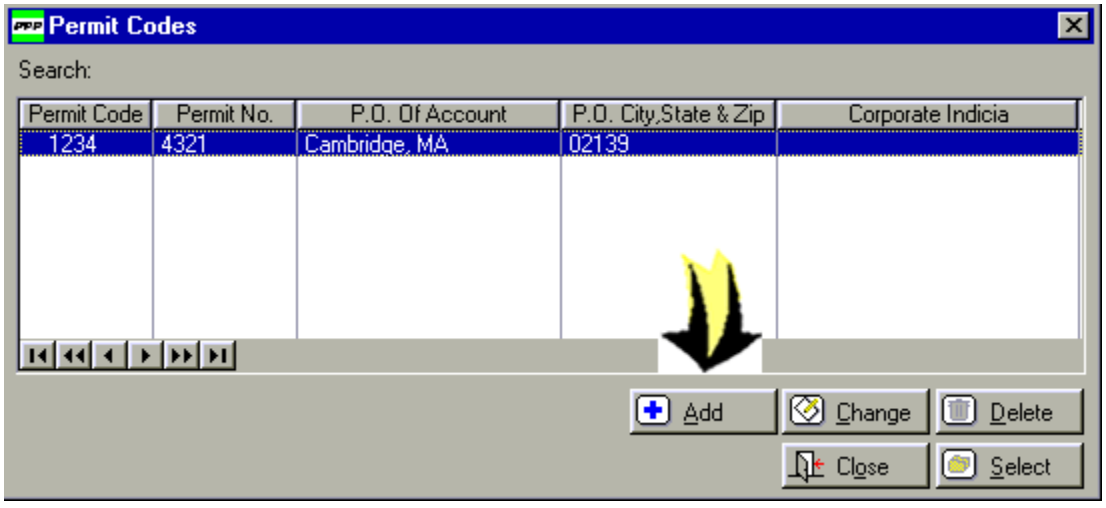
3. Click the Add button in the Return Addresses window.



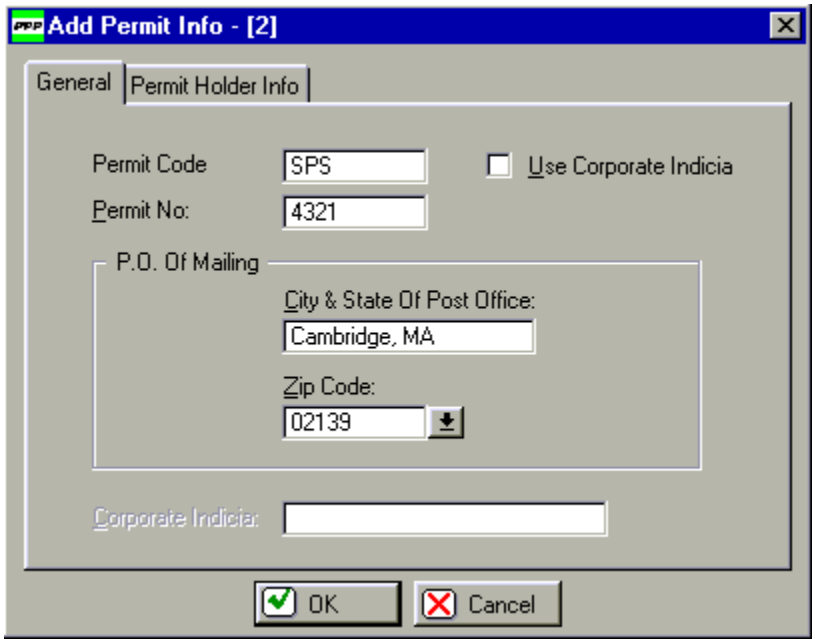
4. Add a Return Address record to represent each permit OTHER THAN THE DEFAULT in Mailer Configuration. Then, check the checkbox at the bottom called "Use Alternate Permit". Select a "Permit Code" from the Permit Code dropdown list.

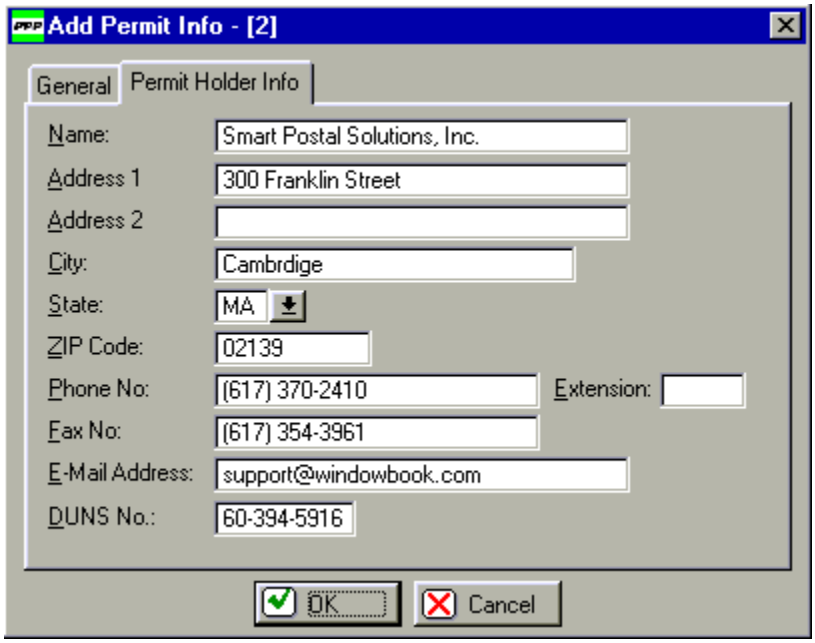


5. Click the Add button to add a new code.



6. This code is not necesarily the permit number but a code to represent the permit so you can use a nickname or client code. In the Add Permit Info window complete the information of both the General tab and the Permit Holder Info tab, then click the OK button.



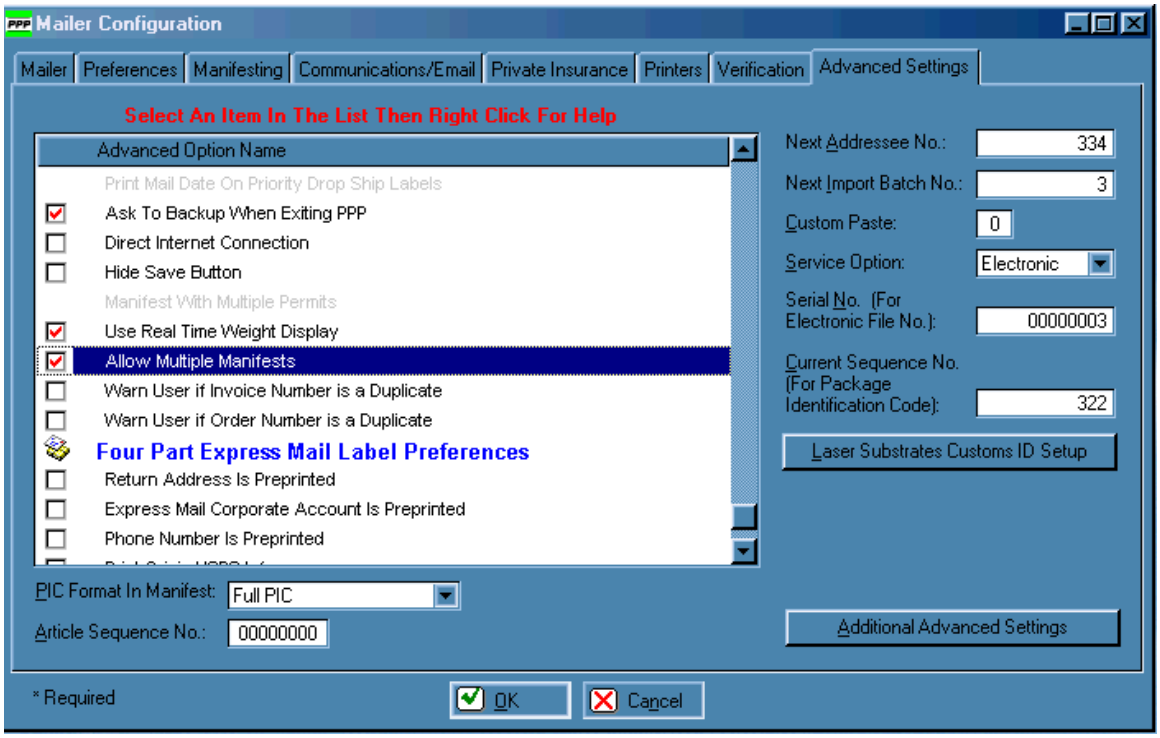


Note: You can have multiple Return Addresses associated with the same permit or you can have each Return Address pointing to its own permit. If the checkbox "Use Alternate Permit" is not checked the software uses the default Return Address in Mailer Configuration. At the end of a day a separate set of manifests and statements are created for each permit.

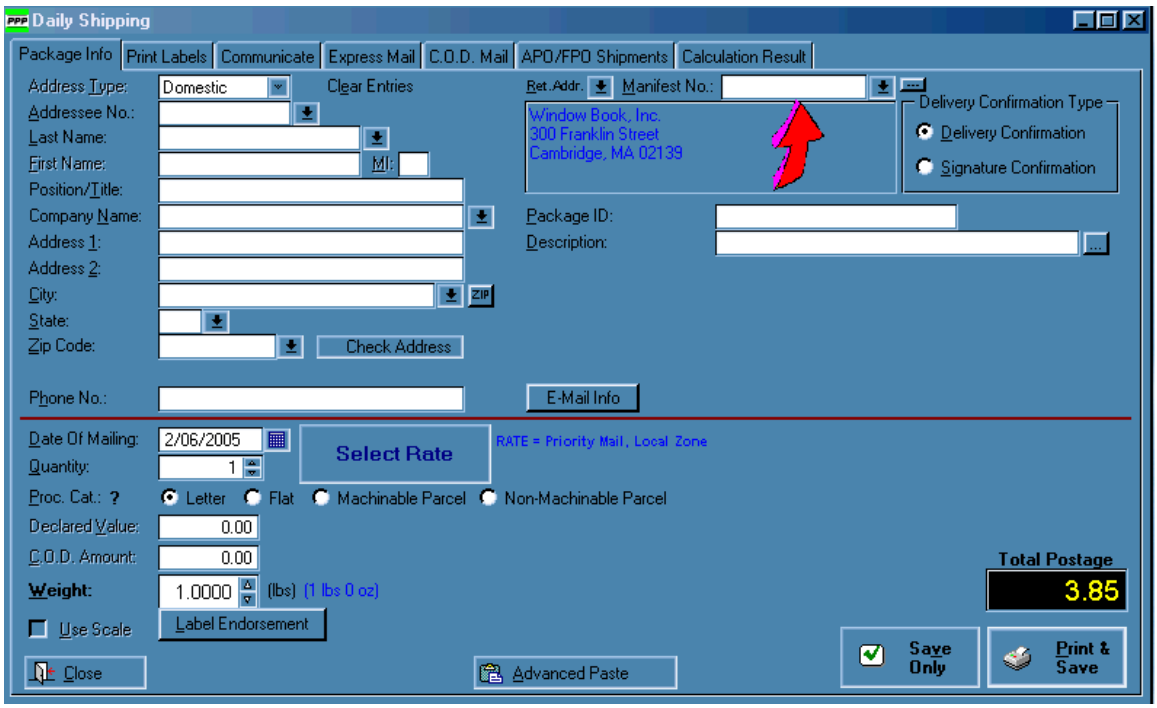
Using Multi-Manifest

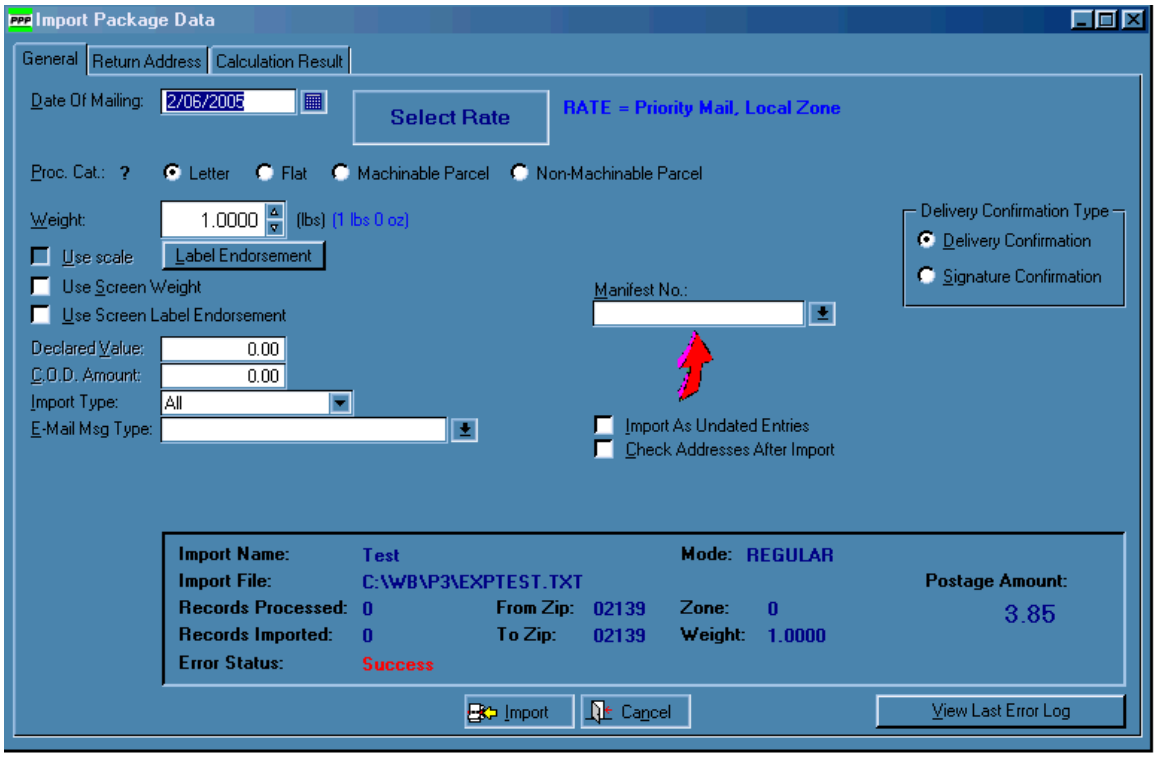
To configure Postal Package Partner to access multiple manifests, follow the steps below:

1. Go to File > System Setup > Mailer Configuration and click on the Advanced Settings tab. Check (double click) the "Allow Multiple Manifests" checkbox at the bottom of the General Section and click the OK button.



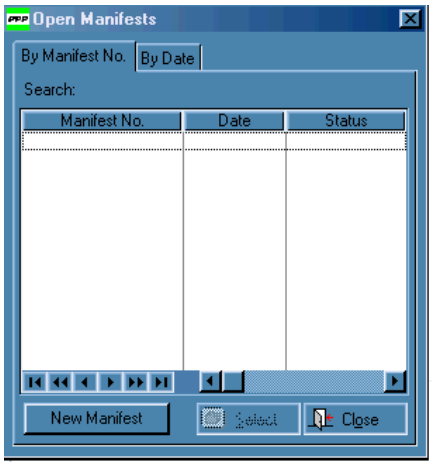
2. You will now notice a new Field called "Manifest No.:" on both the Daily Shipping Screen and on the Import Package Data Screens.

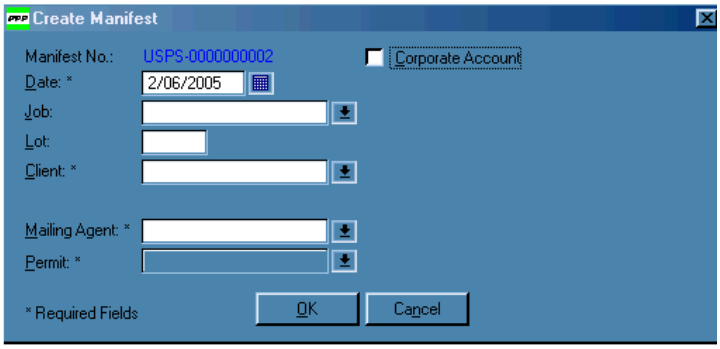




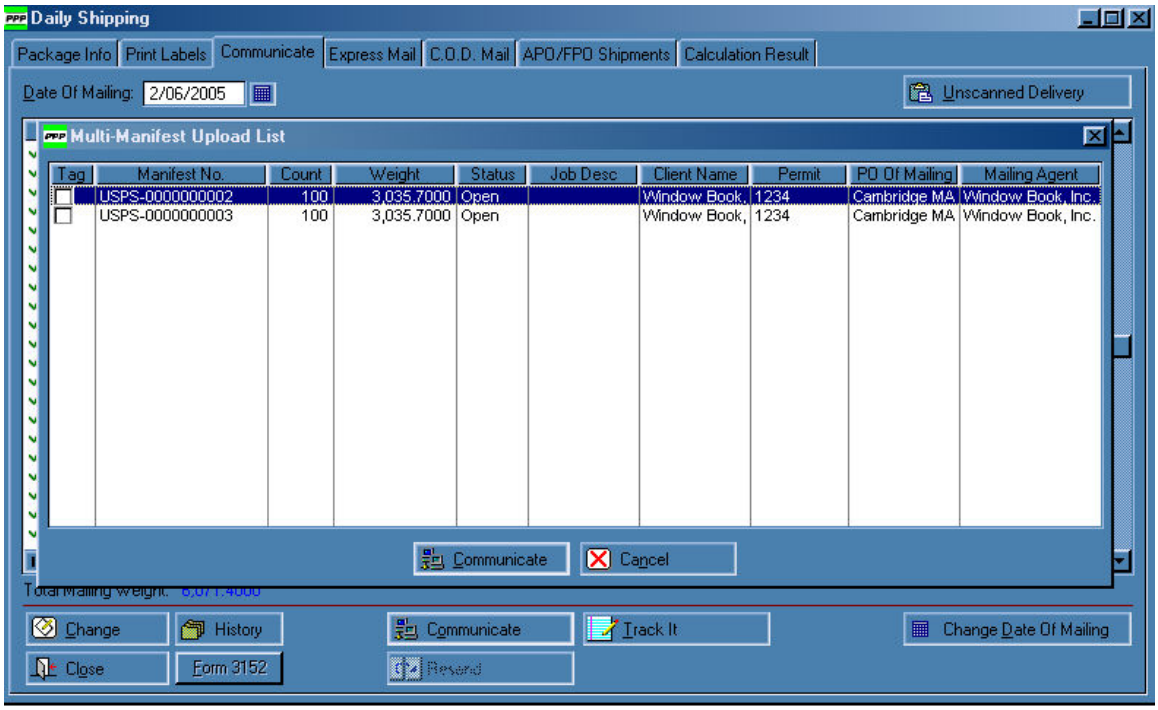
3. As you create packages or import packages, be sure to have a "Manifest No." Selected. Click on the down-arrow next to the "Manifest No." Field to

select an Open Manifest. If you would like to create a new manifest, click on the "New Manifest" Button.



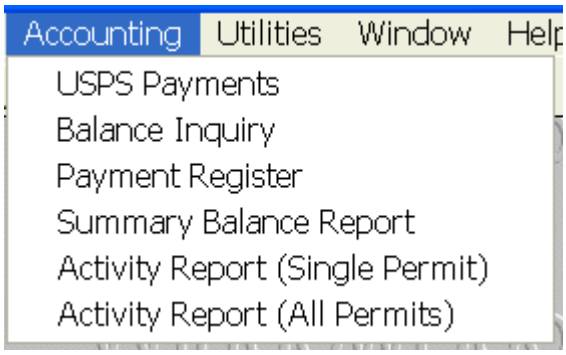


4. When you click on the "Communicate" Button, you will be prompted to select the Manifest(s) that you would like to close. Double-click in the square in the "Tag" Column for each manifest that you would like to close. You will receive a separate Manifest for each Manifest Number.

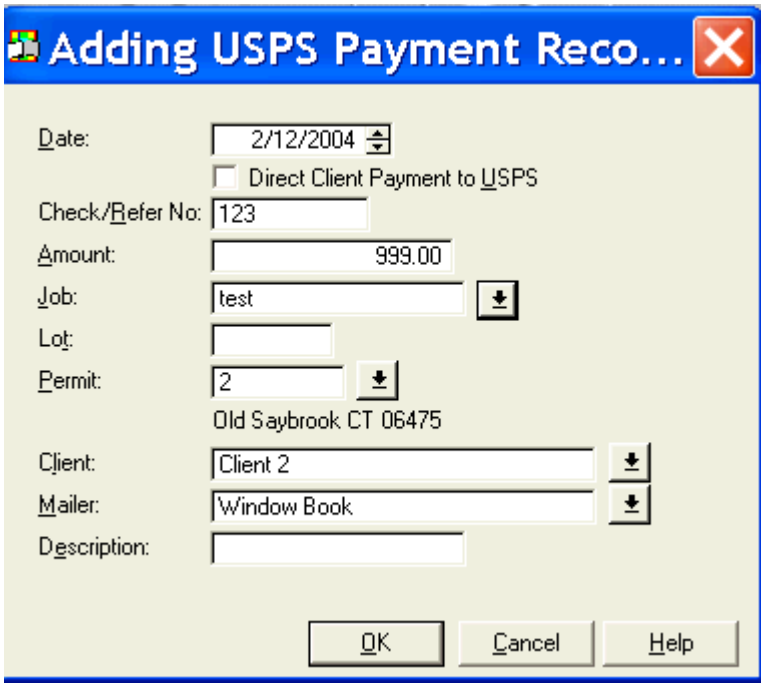


Permit Balance Tracking

USING PERMIT BALANCE TRACKING



USPS Payments

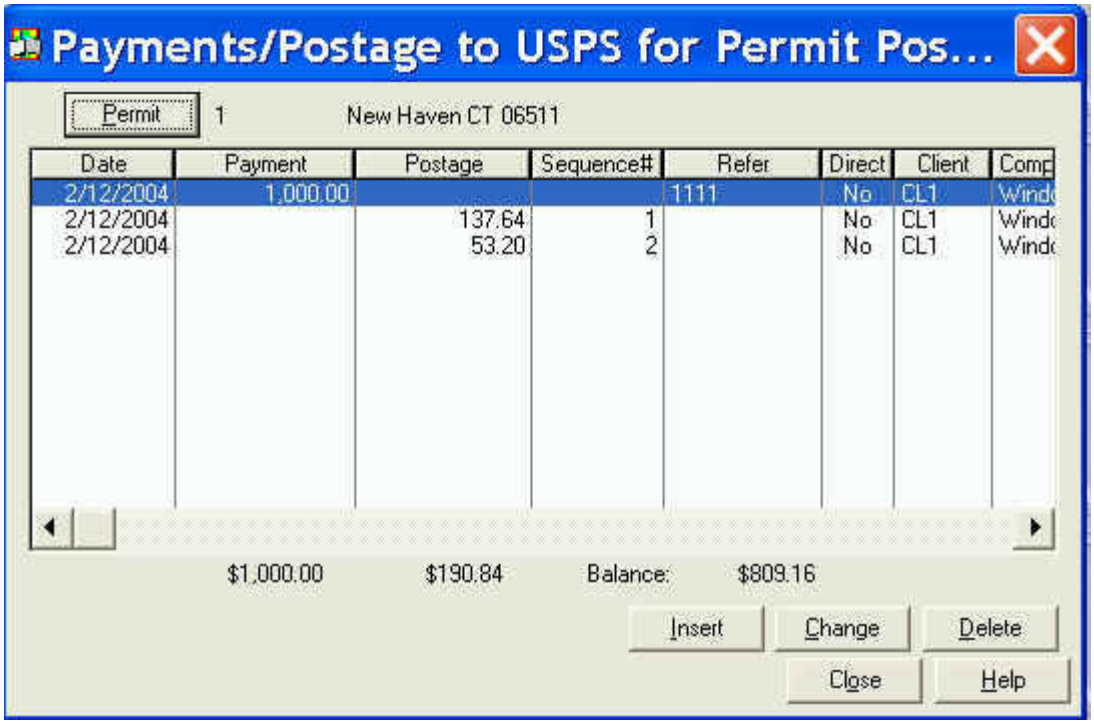


To add a beginning balance, blank out the date, and the check/ref No, Amount, and Permit to apply.

To add additional payments, fill in all of the pertinent information shown above for a USPS payment record. If the client is sending their check made out to or directly to the USPS, check the Direct Client Payment to USPS checkbox.

Balance Inquiry

Choose a Permit off the list that comes up. You will then see this screen:



In addition to being able to view the balance, you can Insert, Change, or Delete line items, for both payments and debits.

Select another Permit to view balance simply by clicking on the Permit button in the upper left corner.

Payment Register Sample Report

2/12/2004 Permit Balance Report for 2/01/2004 to 2/12/2004 Page: 1
Window Book

Reference	Job	Lot	PO of Mailing	Permit	Client	Description	Payment
Window Book							
					Starting Balance:		0.00
222	1234		New Haven CT 06511	1	CL1		250.00
1111	1234		New Haven CT 06511	1	CL1	Payment	1,000.00
123	test		Old Saybrook CT 06475	2	Client	Payment	999.00
66	99999		Hartford CT 06475	3	Client3	Payment	3,002.00
					Company Total:		5,251.00
					Report Total:		5,251.00

Summary Balance Report

Choose a start date and end date range for this report:

2/12/2004 Permit Activity Summary for 2/01/2004 to 2/12/20 Page: 1
Window Book

Permit	PO of Mailing	Beginning Balance	Postage	Payment	Balance
1	New Haven CT 06511	2,500.00	190.84	1,250.00	3,559.16
2	Old Saybrook CT 06475	2,750.00	88.54	999.00	3,660.46
3	Hartford CT 06475	500.00	113.50	3,002.00	3,388.50

Activity Report (Single Permit)

Select a Permit, a start date and end date range for this report:

2/12/2004 Permit Activity Report Page: 1
Window Book

PERMIT: 1 New Haven CT 06511 for 2/01/2004 to 2/12/2004

Date	Stmnt#	Job	Lot	Client	Description	Postage	Payment	Balance
					Beginning Balance - 1/31/2004 :			0.00
2/10/2004	2	1234		CL1	3602-R Postage	53.20		-53.20
2/10/2004	0	1234		CL1	222		250.00	196.80
2/12/2004	0	1234		CL1	1111		1,000.00	1,196.80
2/12/2004	1	1234		CL1	3602-R Postage	137.64		1,059.16
					Report:	190.84	1,250.00	
			Activity for Period:		1,059.16			

Activity Report (All Permits)

Choose a start date and end date range for this report:

2/12/2004 Permit Activity Report for 2/01/2004 to 2/12/200 Page: 1
Window Book

Date	Stmnt#	Job	Lot	Client	Description	Postage	Payment	Balance
PERMIT: 1 New Haven CT 06511								
					Beginning Balance - 1/31/2004 :			0.00
2/10/2004	2	1234		CL1	3602-R Postage	53.20		-53.20
2/10/2004	0	1234		CL1	222		250.00	196.80
2/12/2004	0	1234		CL1	1111		1,000.00	1,196.80
2/12/2004	1	1234		CL1	3602-R Postage	137.64		1,059.16
					Report:	190.84	1,250.00	
			Activity for Period:		1,059.16			
PERMIT: 2 Old Saybrook CT 06475								
					Beginning Balance - 1/31/2004 :			0.00
2/12/2004	0	test		Client	123		999.00	999.00
2/12/2004	3	test		Client	3602-R Postage	88.54		910.46
					Report:	88.54	999.00	
			Activity for Period:		910.46			
PERMIT: 3 Hartford CT 06475								
					Beginning Balance - 1/31/2004 :			0.00
2/12/2004	0	99999		Client3	66		3,002.00	3,002.00
2/12/2004	4	test		Client3	3602-R Postage	113.50		2,888.50
					Report:	113.50	3,002.00	
			Activity for Period:		2,888.50			

Smart Mail

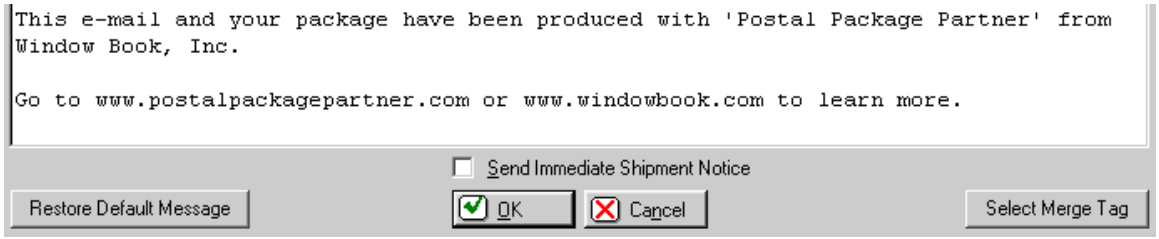
MAILER CONFIGURATION

In the preferences tab, select Smart Mail from the Consolidator Type pick box and enter the Smart Mail Customer number under the Customer Number title. If you are doing more shipments with Smart Mail, then we would recommend checking the 'Default to Consolidator Entry' checkbox.

<Insert Screen Shot>

E-Mail Notification

To avoid long delays in notifying customers of shipments, we recommend enabling the e-mail option that send out e-mails immediately upon uploading data to the USPS or Smart Mail. The problem is that your clients will get tracking links to packages before tracking data is present. To activate this feature, press the 'Shipment Message' button on the communications tab and check the 'Send Immediate Shipment Notice' checkbox. We recommend changing your shipment e-mail notification message to say something like "tracking information will be available using this link starting tomorrow".


This e-mail and your package have been produced with 'Postal Package Partner' from Window Book, Inc.
Go to www.postalpackagepartner.com or www.windowbook.com to learn more.
Send Immediate Shipment Notice
Restore Default Message
OK
Cancel
Select Merge Tag

DAILY OPERATIONS

Creating parcels is done the same way for USPS and Smart Mail parcels but you will notice that under the 'Select Rates' button is a checkbox for Smart Mail. If this is checked, the Select Rates button disappears as does the postage rate display. When the box is checked, the Customer Control Number fields appears at the upper right of the screen and you must be careful to be sure that the correct Customer Control Number appears here. This number corresponds to the number you will be using in the pickup book and must be changed when you start a new manifest. The number will remain as you entered it until changed. You can enter parcels for multiple manifests (Customer Control Numbers) at the same time.

Print Labels Tab

When you go to the Print Labels Tab, you will initially see all parcels, USPS and Smart Mail, mixed together. If you are going to be batch printing labels, we recommend displaying just one or the other. You can do this by selecting "USPS" or "Smart Mail" form the Entry Type drop box that appears at the bottom of the screen under the print button.

Communicate Tab

This tab is used to close manifests and upload contents to the USPS and/or Smart Mail. Press the Communicate button. When you press the button, you will see a list of all manifests available for upload and closure. You can check off which ever ones you wish to close and upload then press the Communicate button on this browse.

<Insert Screen Shot >

Only 1 USPS manifest will be displayed on this list and it will only contain information for packages whose mailing date matches the date on the communicate tab when the original Communicate button was pressed. The Smart Mail manifests will include unshipped parcels for the last 10 days that have not been uploaded yet. If you have been working on a single manifest for multiple days, the older parcels will be 'rolled forward' to the current manifest date.

After the communicate button is pressed, the USPS manifest data will be uploaded to the USPS and the Smart Mail data will be uploaded to Smart Mail.

END OF DAY REPORT

When you have the option to run the End of Day Report, do so. It will create separate reports for each Smart mail manifest listing the Customer Control Number in the report heading. The USPS packages will list on a separate report. You must be very careful not to give packages bound for Smart Mail to the USPS and visa versa.

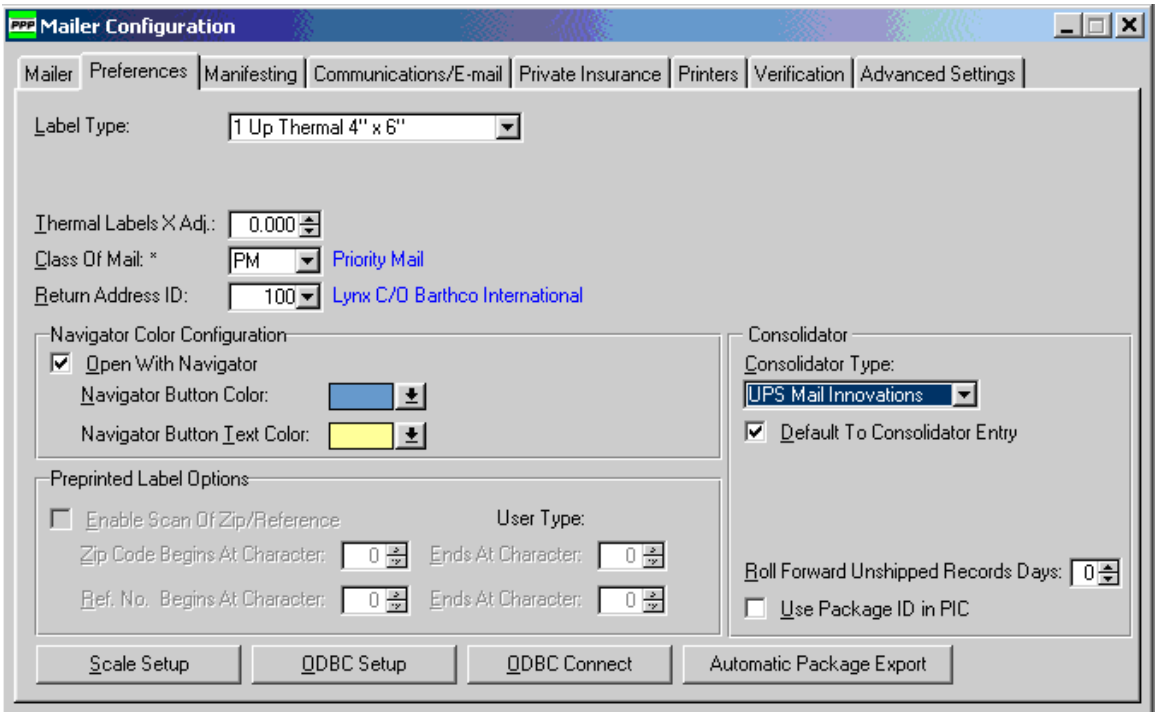
UPS Mail Innovations

This feature allows you to ship your packages with either the USPS or UPS Mail Innovations, or both.

1. Go to the Mailer Configuration screen (File, Program Setup, Mailer Configuration) and click on the "Preferences Tab".

2. Make sure the label type is either 4x5" thermal or 4x6" thermal. In the future we will also support 4x5 Laser (or inkjet).

3. Select UPS Mail Innovations.



4. If you will be shipping with UPS Mail Innovations more than the USPS, check the "default to consolidator entry" checkbox.

5. If you check the "Use Package ID in PIC", it will allow you to manually assign the package ID instead of letting Window Book autonumber it. The next release will also include a setting to allow you to set the fixed length of the package ID field.

6. If you wish the order number to appear at the top of the Mail Innovations label you must go to Advanced Settings and check off the options to enter order number and print order number.

7. Click the OK button at the bottom of the screen to save.

Shipping Label:

Top barcode consists of the 5 digit destination ZIP Code and an 8 digit package ID.

SHIPPING WITH UPS MAIL INNOVATIONS:

In Daily Shipping, you can check the UPS Mail Innovations checkbox under the select rates button to indicate you want to ship that package with UPS Mail Innovations.

You will notice the shipping label looks much different than our normal USPS labels. Please make sure if you are shipping with both the USPS and UPS Mail Innovations, that you keep these packages separate so you give the right packages to the right carrier.

Your 'End of Day' report will now have two sections, one for USPS and one for UPS Mail Innovations.

Since the UPS Mail Innovations packages are not uploaded to the USPS, you will not see them in the communications tab. Tracking can be done using regular FTP or HTTP tracking methods.

E-MAIL Notification

If you are doing e-mail shipment notifications, you may wish to edit the shipment notifications, you may wish to edit the shipment notification message and check the 'Send Immediately' checkbox but include a warning in the e-mail message that the USPS may not show any record of this item for one or two days.

R.R. Donnelley

MAILER CONFIGURATION:

In the preferences tab, select RR Donnelley from the Consolidator Type pick box and enter the RR Donnelley Customer number under the Customer Number title. If you are doing more shipments with RRDL, then we would recommend checking the 'Default to Consolidator Entry' checkbox.

<Insert Screen Shot>

You should then save the Mailer Configuration settings and exit Postal Package Partner, then restart the program and go back to Mailer Configuration Preferences tab.

You must now press the FTP Setup button where you will see to configurations, one for RR Donnelley uploads and another for downloads. Edit the upload setting first and enter all the information supplied by RRDL for the upload site where you will be sending your data. You would then edit the download settings.

Note: You must select 4 x 6 thermal labels option and check the 'Use Standardized USPS format' checkbox.

DAILY OPERATIONS

Package Info Screen

Creating parcels is done the same way for USPS and RRDL parcels but you will notice that under the 'Select Rates' button is a checkbox for RR Donnelley Logistics. If this is checked, the Select Rates button disappears as does the postage rate display. When the box is checked, the Customer Control Number fields appears at the upper right of the screen and you must be careful to be sure that the correct Customer Control Number appears here. This number corresponds to the number you will be using in the pickup book and must be changed when you start a new manifest. The number will remain as you entered it until changed. You can enter parcels for multiple manifests (Customer Control Numbers) at the same time.

Print Labels Screen

When you go to the Print Labels Tab, you will initially see all parcels, USPS and RRDL, mixed together. If you are going to be batch printing labels, we recommend displaying just one or the other. You can do this by selecting "USPS" or "RR Donnelley" from the Entry Type drop box that now appears at the bottom of the screen under the print button.

Communicate Tab

This tab is used to close manifests and upload contents to the USPS and/or RRDL. Press the Communicate button. When you press the button, you will see a list of all manifests available for upload and closure. You can check off which ever ones you wish to close and upload then press the Communicate button on this browse.

<Insert Screen Shot>

Only 1 USPS manifest will be displayed on this list and it will only contain information for packages whose mailing date matches the date on the communicate tab when the original Communicate button was pressed. The RR Donnelley manifests will include unshipped parcels for the last 10 days that have not been uploaded yet. If you have been working on a single manifest for multiple days, the older parcels will be 'rolled forward' to the current manifest date.

After the communicate button is pressed, the USPS manifest data will be uploaded to the USPS and the RR Donnelley data will be uploaded to RR Donnelley.

END OF DAY REPORT

When you have the option to run the End of Day Report, do so. It will create separate reports for each RR Donnelley Logistics manifest listing the Customer Control Number in the report heading. The USPS packages will list on a separate report. You must be very careful not to give packages bound for RR Donnelley Logistics to the USPS and visa versa.

Parcel Direct

MAILER CONFIGURATION

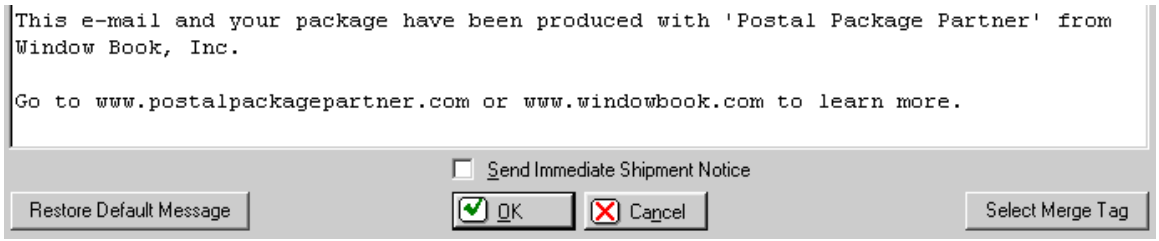
In the preferences tab, select Parcel Direct from the Consolidator Type pick box and enter the Parcel Direct Customer number under the Customer Number title. If you are doing more shipments with Parcel Direct, then we would recommend checking the 'Default to Consolidator Entry' checkbox.

<Insert Screen Shot>

You must now press the FTP Setup button then press INSERT and enter Parcel Direct Upload as the description, choose the upload as the type then enter all the information supplied by Parcel Direct for the upload site where you will be sending your data. You must also repeat the process for the Download site selecting 'download' as the type.

E-Mail Notification

When the parcels are sent through Parcel Direct, shipment notifications sent through the e-mail notification system will have links to the Parcel Direct web site, not USPS site. USPS packages will still have USPS e-mail links but the rest of the e-mail message. To avoid long delays in notifying customers of shipments, we recommend enabling a new e-mail option that send out e-mails immediately upon uploading data to the USPS or Parcel Direct. The problem is that your clients will get tracking links to packages before tracking data is present. To activate this feature, press the 'Shipment Message' button on the communications tab and check the 'Send Immediate Shipment Notice' checkbox. We recommend changing your shipment e-mail notification message to say something like "tracking information will be available using this link starting tomorrow".


This e-mail and your package have been produced with 'Postal Package Partner' from Window Book, Inc.
Go to www.postalpackagepartner.com or www.windowbook.com to learn more.
Send Immediate Shipment Notice
Restore Default Message
OK
Cancel
Select Merge Tag

DAILY OPERATIONS

Creating parcels is done the same way for USPS and Parcel Direct parcels but you will notice that under the 'Select Rates' button is a checkbox for Parcel Direct. If this is checked, the Select Rates button disappears as does the

postage rate display. When the box is checked, the Customer Control Number fields appears at the upper right of the screen and you must be careful to be sure that the correct Customer Control Number appears here. This number corresponds to the number you will be using in the pickup book and must be changed when you start a new manifest. The number will remain as you entered it until changed. You can enter parcels for multiple manifests (Customer Control Numbers) at the same time.

Print Labels Tab

When you go to the Print Labels Tab, you will initially see all parcels, USPS and Parcel Direct, mixed together. If you are going to be batch printing labels, we recommend displaying just one or the other. You can do this by selecting "USPS" or "Parcel Direct" form the Entry Type drop box that appears at the bottom of the screen under the print button.

Communicate Tab

This tab is used to close manifests and upload contents to the USPS and/or Parcel Direct. Press the Communicate button. When you press the button, you will see a list of all manifests available for upload and closure. You can check off which ever ones you wish to close and upload then press the Communicate button on this browse.

<Insert Screen Shot >

Only 1 USPS manifest will be displayed on this list and it will only contain information for packages whose mailing date matches the date on the communicate tab when the original Communicate button was pressed. The Parcel Direct manifests will include unshipped parcels for the last 10 days that have not been uploaded yet. If you have been working on a single manifest for multiple days, the older parcels will be 'rolled forward' to the current manifest date.

After the communicate button is pressed, the USPS manifest data will be uploaded to the USPS and the Parcel Direct data will be uploaded to Parcel Direct.

END OF DAY REPORT

When you have the option to run the End of Day Report, do so. It will create separate reports for each Parcel Direct manifest listing the Customer Control Number in the report heading. The USPS packages will list on a separate report. You must be very careful not to give packages bound for Parcel Direct to the USPS and visa versa.